Central Puget Sound
Regional Fare Coordination System

RFCS Reports Operations Manual

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1 Introduction

This document explains how to use the online reporting system in place for the RFCS.

1.1 Purpose

The purpose of this document is to provide detail on how to use the RFCS Online Reporting System to generate and view reports collected from data associated with the Regional Fare Coordination System (RFCS).

1.2 Scope

This document describes the online reporting system and how it can be used with regard to standard reports created and maintained by VIX.

Note: This document does not include information on ad hoc reporting. For instruction on how to create reports from available data, see SEA-04566 Ad Hoc Report Operations Manual [7].

This manual is used in the Report Operations Module of RFCS training, which presumes knowledge of the RFCS and relevant Agency policies and procedures.

1.3 Terminology

1.3.1 Acronyms and Abbreviations

Table 1 contains the acronyms and abbreviations that are specific to Vix Technology (Vix). In general, industry-standard acronyms and abbreviations are not defined in this table.

Table 1. Acronyms and Abbreviations

Acronym or Abbreviation	Definition
BOEXI	BusinessObjects Enterprise Edge XI
CD	Configuration Data
CRM	Customer Relationship Management
CSR	Customer Service Representative
CST	Customer Service Terminal
ESB	ERG Service Bureau
NTD	National Transit Database
OFS	Offline Server
ORCA	One Regional Card for All
PII	Personal Identifiable Information
RFCS	Regional Fare Coordination System
UD	Usage Data

Acronym or Abbreviation	Definition
VIX	Vix Technology
WEBI	Web Intelligence

1.3.2 Terms

Table 2 contains the terms that are specific to Vix. In general, industry-standard terms are not defined in this table.

Table 2. Terms

Term	Definition
Ad Hoc Report	A query that users define and write to obtain data to meet a specific need.
Agency	Each of the public transportation agencies that are a party to the RFCS agreement.
Configuration Data	A generic term for data that is sent to a device or host to configure its functionality.
Instance (within BOE)	A single generation of a report that (if successful) contains data from the time from which the report was run.
Object (within BOE)	Objects reside within BOE. Objects can be reports, folders, programs, Microsoft Excel files, Microsoft Word files, Microsoft PowerPoint files, Adobe Acrobat files, rich text format files, text files, hyperlinks, as well as object packages, which consist of reports and/or program objects.
Regional Fare Coordination System	All systems, equipment and work to be provided to (a) transportation Agencies under the Contract and (b) other providers of public transportation within the region as may be added to the RFCS either by a contract amendment or by separate contract with the contractor and approved by the Agencies. Said work includes but is not limited to the collection and processing of data related to the transit fares and other fees for government services provided by the Agencies or other providers of public transportation within the region.
Usage Data	A generic term for data that is generated when a transaction or event occurs. For example, a transaction record is a type of usage data.

1.4 References

The following materials are to be used in conjunction with or are referenced by this document.

[1] Contract 229944, as amended and conformed

[2] SEA-00833 RFCS Reporting Requirements (DR 111)

[3] SEA-01043 Seattle Central Glossary

[4] SEA-02938 Report Hierarchy-Folder Structure

[5] SEA-04382 RFCS Reports Operations Quick Reference Guide

[6] SEA-04547 RFCS Online Reporting Configuration

[7] SEA-04566 Ad Hoc Report Operations Manual

[8] SEA-04802 RFCS Guide - User Security Access Request Form

[9] SEA-06063 Auto Generating Report Configuration

[10] SEA-07920 RFCS Report System Quick Reference Guide – Business Accounts

2 Reporting Overview

The reporting system contains reports as defined within SEA-00833 RFCS Reporting Requirements (DR 111) [2]. Many of these reports are generated automatically on a daily, weekly, monthly, quarterly, or annual basis in addition to being available on demand.

The reports are divided into the following categories:

- Service Bureau Call Center Metrics
- Website Performance
- Financial Management
- General Management
- Institutional
- Card Management
- System Maintenance
- Mail Center
- National Transit Database (NTD)
- Common Ridership and Revenue

2.1 Reporting Architecture

The RFCS has a common architecture for data access, reporting, and information delivery. The RFCS that is integrated with SAP is built on a scalable multi-tier report processing architecture as illustrated in Figure 1. The circled area indicates where reports are generated.

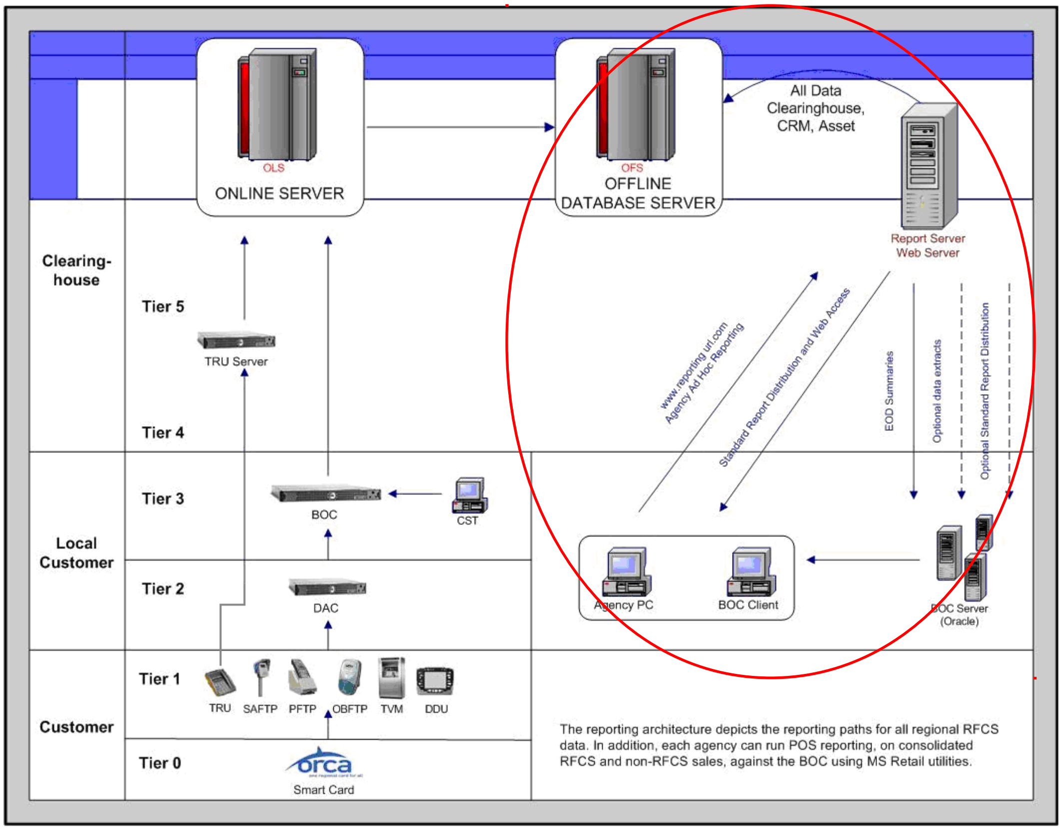

Figure 1: RFC System Reporting Architecture

2.2 RFCS Reporting Components

Table 3 identifies the products used within the reporting infrastructure.

Table 3. RFCS Reporting Components

Component	Product
Report Server	Oracle
Reporting Engine	SAP BusinessObjects Enterprise Edge XI (BOEXI)
Report System GUI	SAP InfoView
Reporting Template Creation	SAP Crystal Reports
Reports Archive	BOEXI + File System
Standard Report Views	SAP Business View Manager
Ad Hoc Querying	SAP Web Intelligence
Ad Hoc Data	SAP BusinessObjects Universes

2.3 Reporting Roles and Security

Every person who accesses standard reports or ad hoc data has a unique user ID and password for the online system. Each user ID is associated with specific roles that in turn determine the level of security for each user.

All administration of user IDs is handled by Vix.

The roles relevant to reporting functions (including ad hoc) are shown in Table 4.

Table 4. Roles for Reporting Functions

Role	Associated Access Rights
AgencyAdhoc	access to ad hoc data (excluding data associated with Personal Identifiable Information (PII))
AgencyAdhocPII	access to ad hoc data – including PII
ARM	objects specific to the Automatic Revalue Manager
CardManagement	card management objects
CustomerService	customer service and website related objects
ESB	Vix Technology customer service objects
Finance	financial objects
FiscalAgent	fiscal agent financial objects
GeneralManagement	general management objects
Institutional	Institutional objects – accessible by Agency users only
Institutions	Institutional objects – accessible by Business Account users only
LeadAgent	objects specific to Lead Agencies
MailCenter	objects specific to the mail center
NTD	National Transit Database objects
Ridership	ridership objects
SystemMaintenance	system maintenance objects

3 RFCS Online Reporting System (ORCA Reports)

Vix uses BusinessObjects Enterprise Edge XI (BOEXI) for its online reporting system. The GUI through which the reporting tools are accessed is called InfoView.

3.1 Logging On

The reporting system is for Agency and Business Account use and it requires a Windows Active Directory (AD) user ID and password for access. This site contains all reports defined in SEA-00833 RFCS Reporting Requirements (DR 111) [2], and based on the user's role(s), only applicable reports are visible to each user.

3.1.1 Accessing the Log On Window

There are multiple ways to access the online reporting system:

1. On the ORCA Agency Website, select one of the **Reports** links as shown in Figure 2 and Figure 3.

Figure 2: ORCA Agency Website Reports Link – Not Logged In

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Figure 3: ORCA Agency Website Reports Link – Logged In

2. On the ORCA Business Account Website, you must be logged in to select the **Generate Reports** link as shown in Figure 4.

Figure 4: ORCA Business Accounts Website Generate Reports Link – Logged In

3. Direct URL access at https://reports.orcacard.com

The **Log On to ORCA Reports** window displays as shown in Figure 5.

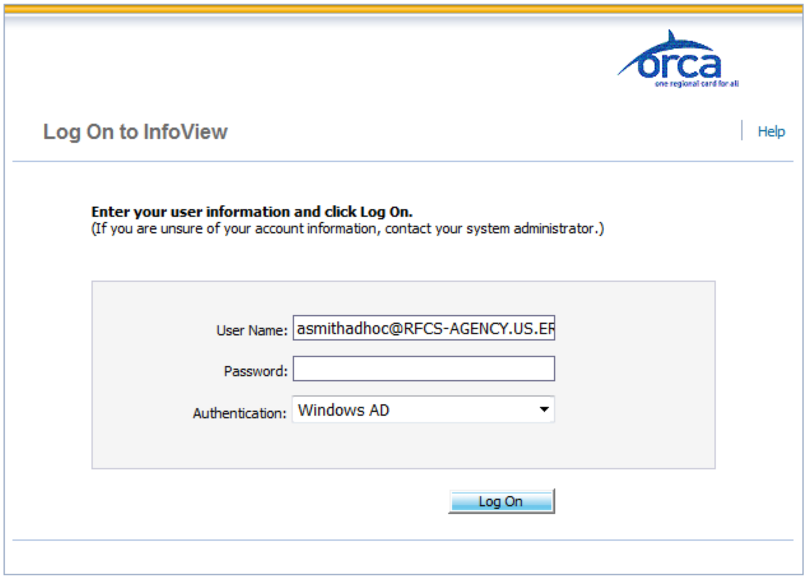


Figure 5: Log On to ORCA Reports Window

Once the Log On to ORCA Reports window is accessed, the page can be bookmarked directly for future reporting access. (It is not necessary to continue to go through the Agency or Business Account websites.)

3.1.2 Logging On to InfoView (ORCA Reports)

Figure 6: Components of the Log On to ORCA Reports Window

1. **User Name**: Enter the appropriate User Name (RFCS User ID or Business Account User ID).
   - Agency users must use the following format (case sensitive): **userid@RFCS-AGENCY.US.ERGTRANSIT.COM**
   - Business Account users need only enter their 4-digit User ID

4. **Password**: Enter the associated Password.
5. **Authentication**: Select **Windows AD** from the authentication list if not already selected.
6. Click the **Log On** button.

Note: Click **Help** at any time to access online help from SAP.

3.2 Logging Off

When you are finished working in InfoView, it is important to log off. This can take place from any folder level. However, if you do not log off and there is no activity within 20 minutes, you will automatically be logged off. Logging off ensures that another user cannot access the reporting system with your privileges if you walk away from your workstation. Logging off also frees up a license as there can only be a set number of users logged in at any given time.

Note: Clicking the **Close** button  at the top right of a browser to close the active window does NOT log you off InfoView.

To log off:

1. Select the **Log Out** link in the Header Panel (see Figure 7) from any page.

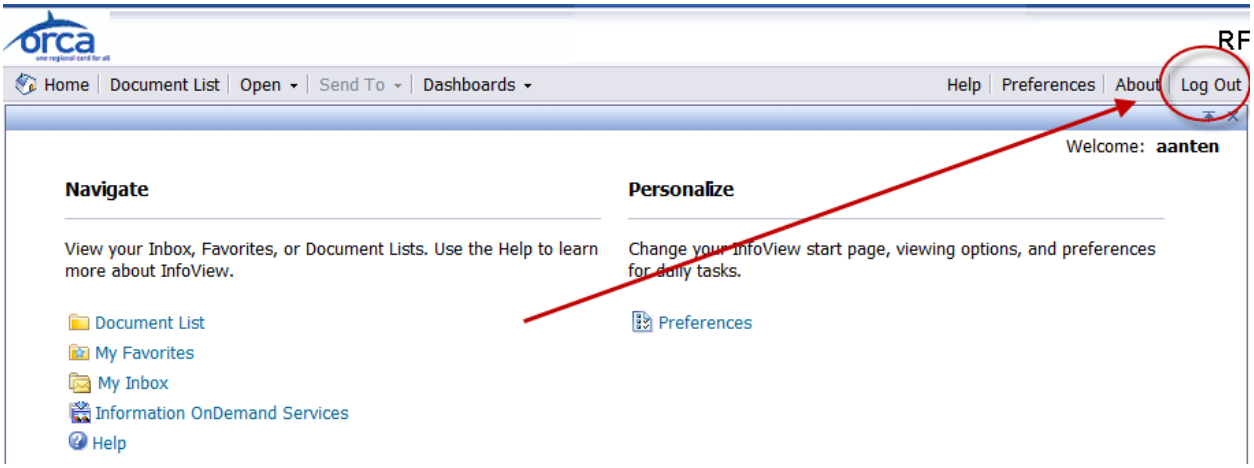


Figure 7: Example of Log Out Link

You are then returned to the **Log On** page and have successfully logged out of the reporting system.

Note: If you are inactive for 20 minutes and time out, then attempt to navigate within InfoView, you will receive an error message such as "An error has occurred: A timeout error has occurred." When this happens, simply choose the Log Out option and then log back in to InfoView.

3.3 ORCA Reports - Home

When InfoView initially starts, it displays the **Home** location as shown in Figure 8. InfoView is divided into two panels, the Header Panel and the Workspace Panel. The Header Panel never changes and is static throughout all pages of the site. The Workspace Panel will change depending on the specific area being accessed. details the different components of the default **Home** page; the item numbers in the table correlate to the circled numbers in the figure.

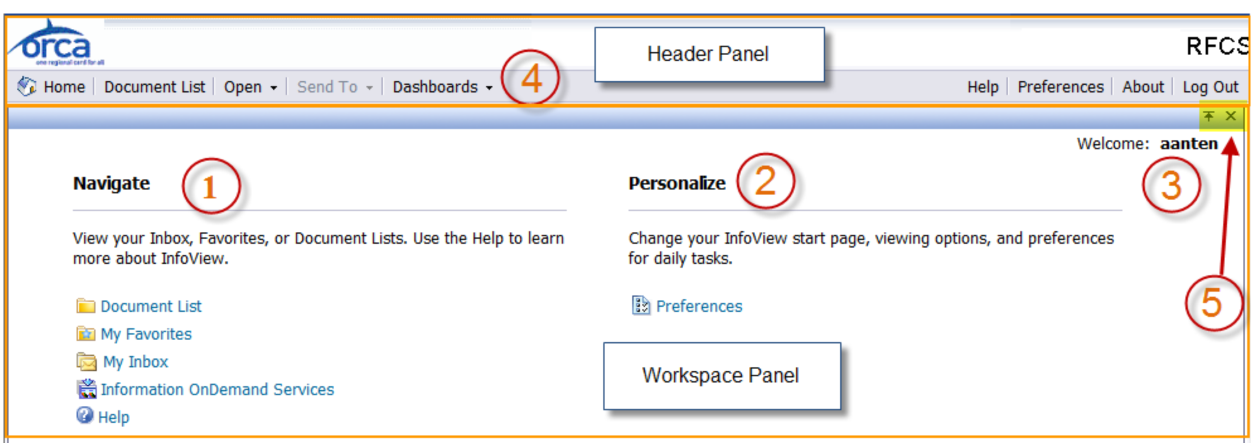


Figure 8: ORCA Reports Home Page

Table 5. Home Page - InfoView

Item	Title	Feature
		Workspace Panel
(1)	Navigate	Quickly navigate to specific sections within ORCA Reports
	Document List	This will present all objects and reports available in the RFCS (based on the User ID permissions) in a folder/file structure similar to a program like MS Windows Explorer. Navigating the Document List is explained in detail in section 3.4.
	My Favorites	Each user has a personal folder associated with his or her User ID. This is a location from which the user can copy objects, save ad hoc queries, and create or upload documents from the local file system. All objects within My Favorites are not visible to any other user and are not maintained by the Vix Administrator.
	My Inbox	This is a location in which successful object instances can be delivered for easy access and/or manipulation. It is a private “mailbox” for generated object instances. The Inbox is explained in more detail in section 3.4.5.
	Information OnDemand Services	Takes the user to an SAP website (outside of the RFCS Online Reporting System) in which information can be searched/obtained for a variety of topics.
	Help	New window will pop up that provides general information on how to navigate/work within InfoView.
(2)	Personalize	Personalize your online system based on the userid used to access the site. Personalization includes Home location, viewer preferences, Web Intelligence settings, and more.
(3)	Welcome	Displays the current logged in user name
(5)	Close (“X”)	The “X” in the upper right of the Workspace Panel will close the current panel and return the user to the prior panel. This does NOT close the browser nor end the session.
		Header Panel
(4)	Header Panel	Quickly jump to commonly used areas within ORCA Reports by clicking a menu option. This menu is static for all pages.
	Home	When selected the user will return to the startup page as specified in their preferences.
	Document List	This will present all objects and reports available in the RFCS (based on the User ID permissions) in a folder/file structure similar to a program like MS Windows Explorer. Navigating the Document List is explained in detail in section 3.4.
	Open	Users can launch an Encyclopedia (requires download) or view/design their “My InfoView” page. My InfoView is detailed in section 3.6.
	Send To	This option is only available when an instance is highlighted. The user can send an instance to BusinessObjects Inbox, Email, FTP Location, or File Location. Destination information is detailed in section 3.5.5.6.
	Dashboards	Not applicable (this option will remain grayed out as it is not being utilized within the reporting system)
	Help	New window will pop up that provides general information on how to navigate/work within InfoView.

Item	Title	Feature
	Preferences	Set user preferences with regard to Home location, viewer preferences, Web Intelligence settings, and more.
	About	Provides Copyright, Product, and Sales information about SAP BusinessObjects Enterprise XI
	Log Out	Logs the user out of InfoView and returns to the Log In window.

Note: In the Workspace Panel, the “X” in the upper right will close the current panel and return the user to the prior panel. This should not be confused with the “X” in the upper right associated with the browser window – which will close the browser window completely – which does NOT log the user out of the RFCS Online Reporting system.

3.3.1 Preferences

You have the ability to modify your own preferences as they apply to various components within InfoView. The preferences remain associated with the logged in account. If that account is accessed from a different computer, the preferences follow the account. In other words, preferences are account-specific, not machine-specific.

To modify your user preferences, on the **Home** page, click the **Preferences** link in the Workspace Panel under Personalize or from the link on the right side of the Header Panel. The **Preferences** window displays the viewing options and preferences associated with the current User ID with the General section expanded by default (see Figure 9). You can expand or collapse the different areas for which changes can be made by clicking on the section name.

Figure 9: User Preferences – General Preferences

3.3.1.1 General Options

In Figure 9, the numbered areas are detailed as follows:

1. Indicates that **General** preferences are selected.
2. Defines what you see when first logging in to the reporting system (e.g., **My Favorites** rather than the default **Home** page). When you change this value, it becomes the new “Home” location when the Home link is selected in the Header Panel.
3. Document Navigation View - Vix does not maintain categories, so changing this option from Folder to Category is not useful and will cause all objects to be hidden.
4. The default number of objects shown on each page is 10, however this can be increased or decreased as desired (e.g. there are over 10 objects in the “Financial” folder, so changing this value to be higher would show all objects on one page rather than having to navigate to a second page).
5. By default, all object properties are displayed when viewing the Document List. If you want to change what is displayed, check or uncheck options as desired.
6. When you view a document, how do you want to display the results:
    - InfoView portal – generates the results within a new Workspace Panel (default)

- Single fullscreen browser window – will open a new browser window with the results, and only one document will display (one window) at any given time.
- Multiple fullscreen browser windows – will open a new browser window for each document that is selected.

7. Locales & Time Zones - By default the locale and time zone settings are based on the location of the report server (PST/PDT). However, this can be altered if desired (though not recommended).

3.3.1.2 Change Password

Since User IDs and passwords are maintained by Vix using Windows AD, you will not be able to change your password through the online reporting system. Attempting to do so will result in an “Access is denied” error message.

3.3.1.3 Web Intelligence

For users associated with the agency adhoc reporting roles, they will develop ad hoc reports in Web Intelligence (Webi). Ad hoc users can change the settings of Webi to suit their specific needs. Detailed information on using Web Intelligence and the associated preferences can be found in SEA-04566 Ad Hoc Report Operations Manual [7].

3.3.1.4 Desktop Intelligence

Desktop Intelligence is not used by ORCA Reports. Any changes in this section will be irrelevant and have no affect on the functionality of InfoView.

3.3.1.5 Crystal Reports

All reports created and maintained by Vix are built using SAP Crystal Reports. When a report is viewed on demand, a user can change the default viewing format, printing controls, and other options. Again, some selections will require additional downloading of controls, and this may not be an option with some corporate IT policies. The defaults (no download required) will be used throughout this document.

3.3.1.6 Dashboard and Analytics

Dashboards and Analytics is not used by ORCA Reports. Attempting to view preferences in this section will result in an error stating, “The PMUser account is missing or corrupted.”

3.3.2 Workspace Panel

The Workspace Panel is the main window that changes based on user selection. This is where the document list is displayed, options are presented, and results are displayed. The current panel can be closed by selecting the “X” in the upper right corner of the active panel (not to be confused with the “X” that closes the browser completely) and the user will be returned to the prior Workspace Panel.

3.3.3 Header Panel

The Header Panel does not change and is static for all areas of InfoView. This area contains common tasks that can be launched at any time while logged on to the reporting system.

3.3.3.1 Home

This link will return the user to their “Home” location as defined in their Preferences. When initially accessed, the “Home” location will be as displayed in Figure 8, however this can be changed as explained in section 3.3.1.1.

3.3.3.2 Document List

This will launch the Document List as the active Workspace Panel in which the user can search for specific objects, run reports, view instances, access favorites, open their associated Inbox, and create ad hoc reports. Detailed information regarding the Document List is found in section 3.4.

3.3.3.3 Open

The two options in Open are “My InfoView” and “Encyclopedia.” The Encyclopedia is not used nor maintained by Vix, however if selected the user can utilize the Search function within the resulting panel. My InfoView is a customizable dashboard (of sorts) that each user can set up to specifically meet their individual needs. My InfoView can then be selected as the startup location in user Preferences.

3.3.3.3.1 Encyclopedia

Launching the Encyclopedia will allow the user to search for specific terms as used in the online reporting system. Search results are specific to the terms used and contained *only* within ORCA Reports and does not search outside the reporting system.

The Encyclopedia panel, which will launch in the right of the Workspace Panel, will contain a small arrow in the upper right corner. Selecting the arrow will produce a small menu in which the user can select “Encyclopedia” (not used) or “Search.” Choosing search will display a text box and a button to launch the search.

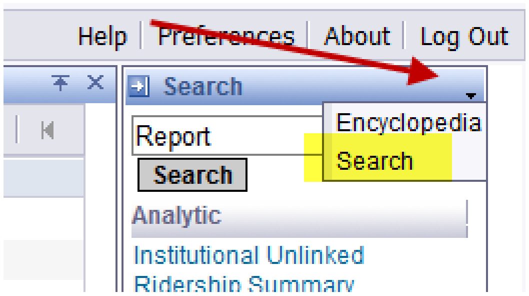


Figure 10: Encyclopedia Panel Menu (Search)

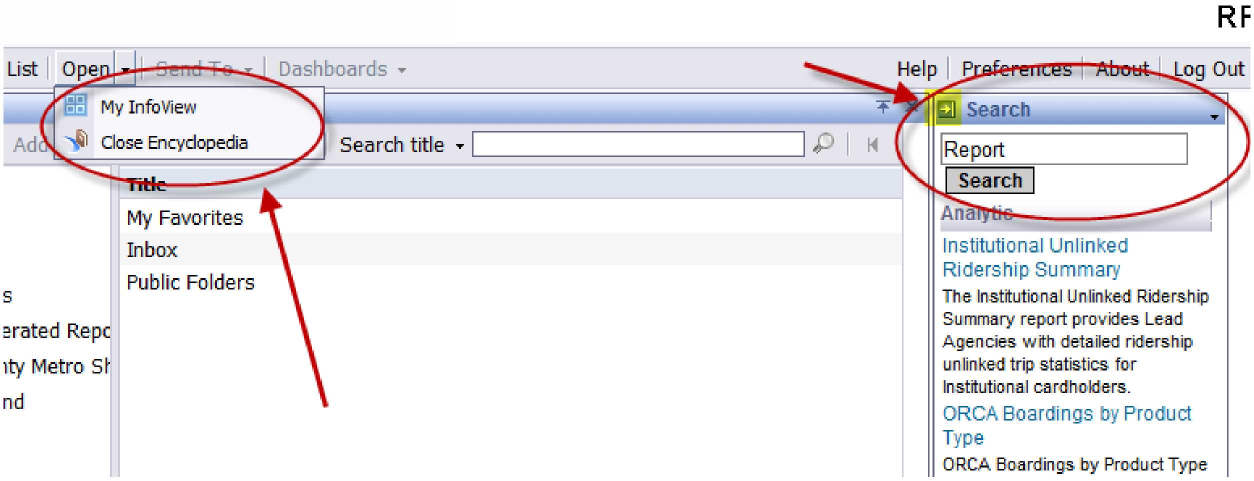


Figure 11: Encyclopedia/Search Panel

Once the Encyclopedia is launched from the Open link, selecting the link again will now display "Close Encyclopedia." Choosing this option will close the Encyclopedia or Search panel. It can also be closed by clicking the "hide" arrow in the panel itself (highlighted above).

3.3.3.4 Send To

When an object in the Document List is highlighted, the option to Send To will be available if permissions associated with the object allow it. Choosing Send To will send the actual object file to the destination selected. For example, highlighting a Crystal Report and choosing Send To will send the actual .rpt file to the destination selected. Highlighting an Excel instance of a report will send the actual .xls file to the destination selected.

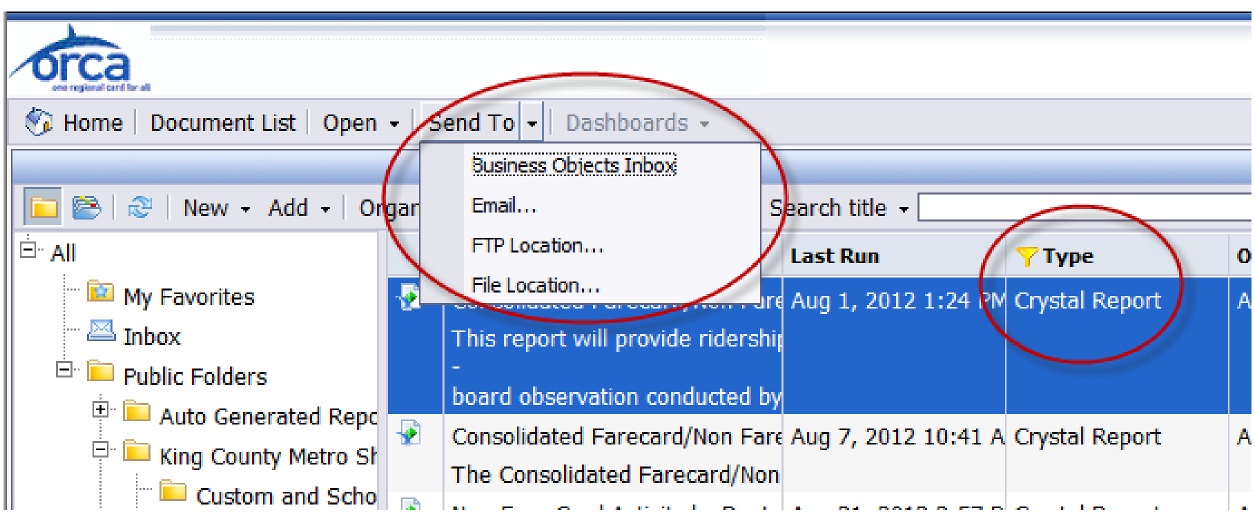


Figure 12: Send To

The Send To options include:

1) BusinessObjects Inbox – you can send the object file to a specific user within BusinessObjects (or yourself) providing you have the necessary permission to the destination recipient's Inbox. The file will then appear in the selected Inbox for future viewing. When selected, be sure to UNCHECK the "Use default settings" box in order to select the appropriate recipient's Inbox.

2) Email – the object file will be emailed to the identified recipient. When selected, be sure to UNCHECK the “Use default settings” box in order to enter the recipient’s information.

3) FTP Location – the object file will be sent to an FTP location as indicated by the user. When selected, be sure to UNCHECK the “Use default settings” box in order to enter the appropriate FTP login information.

4) File Location – the object file will be sent to a location on the user’s local computer being used to access ORCA Reports. When selected, be sure to UNCHECK the “Use default settings” box in order to enter the appropriate file location options.

For detailed information on setting destination options, see section 3.5.5.6.

3.3.3.5 Dashboards

Dashboards are not active within the ORCA Reports system. Selecting this object will result in an error message.

3.3.3.6 Help

Selecting Help will launch a new browser window containing SAP BusinessObjects Enterprise InfoView User’s Guide. Users can search for a specific topic associated with InfoView.

3.3.3.7 Preferences

This option allows the user to modify personal preferences as explained in section 3.3.1.

3.3.3.8 About

This section provides Version and Copyright information about SAP BusinessObjects Enterprise XI. There is also a hyperlink to SAP’s website in order to obtain additional information on their products.

3.3.3.9 Log Out

This option logs the current user out of the reporting system as detailed in section 3.2.

3.4 Document List

The Document List displays all files, folders, and objects contained within ORCA Reports in a tree panel. The contents of ORCA Reports are organized in a hierarchical structure that is defined in SEA-02938 Report Hierarchy-Folder Structure [4]. Based on the logged in User ID, the files, folders, and objects displayed will be based on the roles associated with that user.

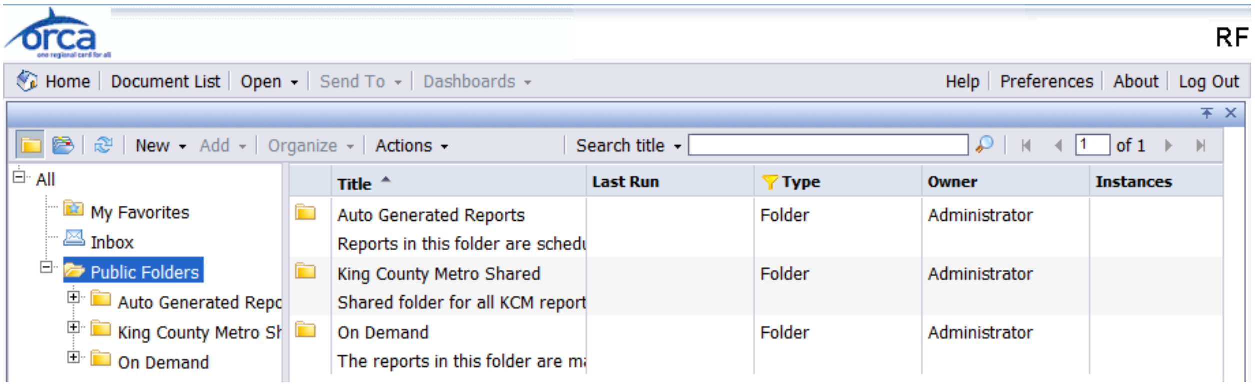


Figure 13: Document List

The Document List can be the startup location when logging into InfoView by changing your user Preferences.

To set the startup location:

1) Launch Preferences

2) In the InfoView Start Page section, choose “Folder” and then the “Browse Folder” button

3) Highlight Public Folders from the “Select a folder” popup, then press OK

4) Select OK to save your preference changes

5) Select the Home button on the Header Panel. The new Home and Startup destination is the Document List.

3.4.1 Folder Navigation

When viewing the Document List, you can navigate through folders and subfolders as you would a standard tree structure. Folders will display on the left side of the Workplace Panel and ‘-“ and “+” will appear next to a folder to indicate its ability to be expanded or collapsed. You can double-click a folder to open it and view the contents, or you can select the “+” to expand when subfolders exist. When a folder is selected and highlighted, the contents will display on the right of the Workplace Panel. Additional folders, files, and other objects can be contained and displayed within a folder.

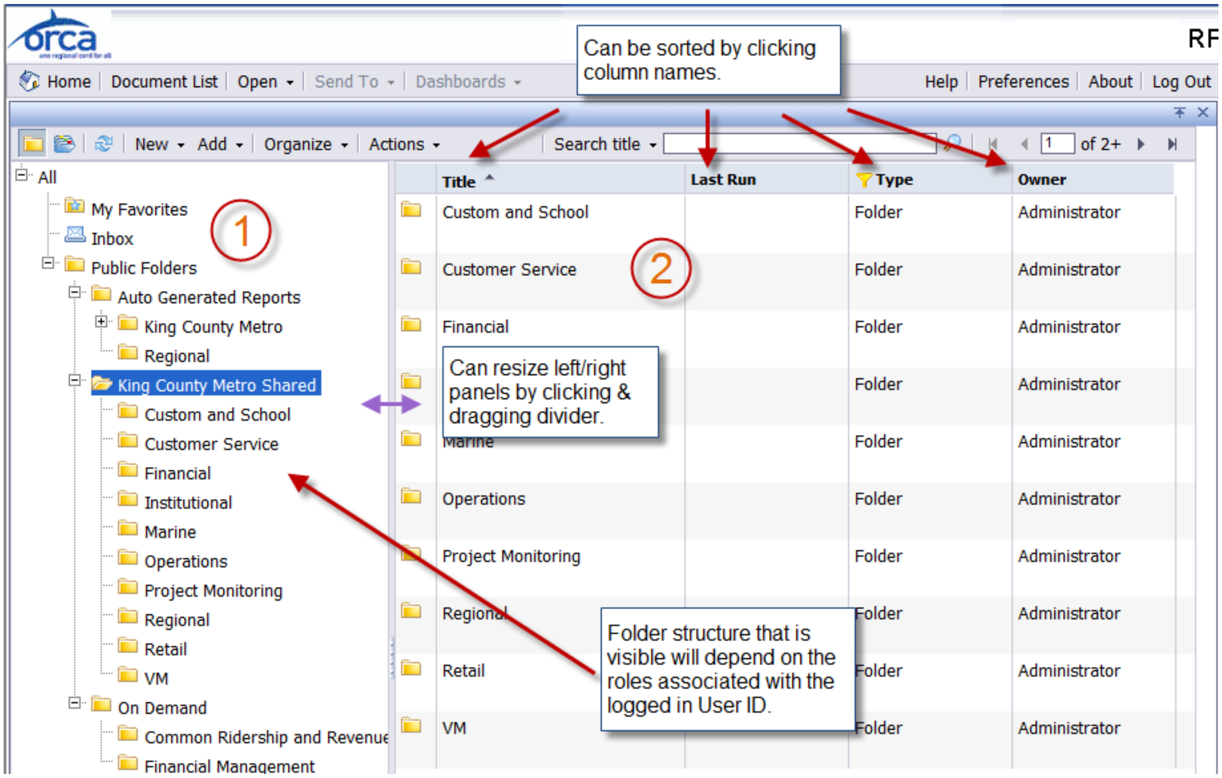


Figure 14: Document List – Folder Structure

Based on the User ID that is logged in, the folders that appear will be associated with the roles assigned to that User ID. Refer to section 2.3 for a list of all roles available for ORCA Reports. In order to change associated roles, you must complete the SEA-04802 RFCS Guide - User Security Access Request Form [8].

You can resize the left and right sections of the Workplace Panel by moving your mouse over the divider and clicking/dragging when the mouse pointer changes to a double-sided arrow.

You can sort the results by clicking on any column name. The first click will sort in Ascending order, and a second click will sort in Descending order. A small arrow will appear next to the header that is currently used for sorting.

Based on the "Set the number of objects (max.) per page" value that was entered in the user Preferences (default is 10), that is the number of objects that will appear in the right side of the Workplace Panel. As the value is increased, scroll bars will appear to allow for all objects to appear in one panel.

Note: When more than the max number of objects exist, additional navigation buttons will become active (see Figure 15).

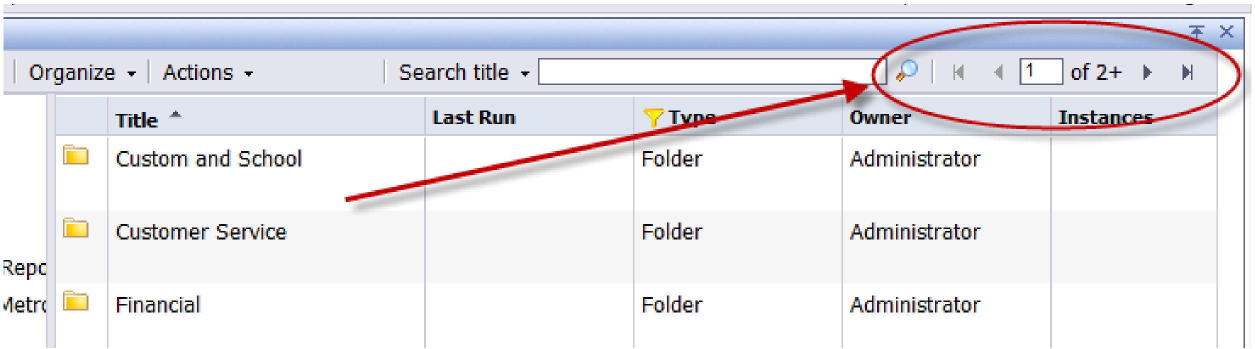


Figure 15: Document List - Navigation

3.4.2 Menu Bar

The Menu options at the top of the Document List Workplace Panel provide quick links to perform common tasks associated with ORCA Reports.

3.4.2.1 Switch to Folders / Switch to Categories

Vix does not maintain nor provide the option to use Categories within the online reporting system. These two menu options are irrelevant and unnecessary. By default, all objects are in "Folder" view and should not be changed. Selecting the "Switch to Categories" option will cause all objects to be hidden as nothing is associated with a category.

3.4.2.2 Refresh

This option will refresh the current Workspace Panel. This is most useful when viewing the History of an object. The status of an instance can change from *running* to some other status upon completion. Also, if objects are added to a folder while the session is active, choosing Refresh will cause the newly added object to now display in the Document List.

3.4.2.3 New New

Based on the permissions associated with the current user, the New options will change. If a Vix maintained folder/object is highlighted, there may be no available options to choose from. However if a personal or shared folder object is highlighted, additional options may appear. Figure 16 shows options available when a shared folder is selected.

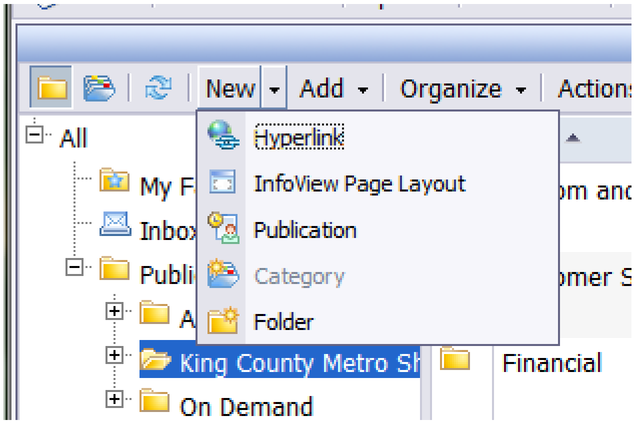
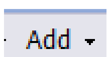


Figure 16: New Options for a Shared Folder

1) *Hyperlink*: A user can add a hyperlink object to the shared folder that other users can activate.
2) *InfoView Page Layout*: Allows the user to modify their My InfoView design or create a new design based on the current shared folder location. Additional information on creating/editing InfoView layouts can be found in section 3.6.
3) *Publication*: A "publication" is a collection of documents intended for distribution to a mass audience. Publications are not used by ORCA Reports.
4) *Category*: Not applicable/available
5) *Folder*: A user can create a subfolder within their personal or a shared location.

3.4.2.4 Add 

With the appropriate roles associated with the User ID, a user can add a Local Document to a shared or personal folder location.

A Local Document can be added to InfoView that others can access if they also have permission to use the shared folder location. Documents that are uploaded are stored on the report server and are backed up regularly. The type of documents that are recognized are:

- Microsoft Excel
- Microsoft Word
- Adobe (PDF)
- Text
- Rich Text
- Microsoft PowerPoint

If a file of some other type is desired, it can also be uploaded. InfoView will not recognize the file type and assign it as "Other" and there will not be an identifiable icon associated with it. "Other" is what will display in the "Type" column of the Document List.

Add a Document:

1. Navigate through the Document List to the folder in which the object is to be added
2. Select Add from the menu bar OR right-click the folder and select Add from the pop-up menu

3. Choose Local Document

Note: The Crystal Report option will not function because unless the data can be accessed from the report server, the report will not generate. This is an option that is only available to the ORCA Report Administrator.

4. The Select Document Workspace Panel will appear. Choose Browse to find the document in the local file system. InfoView will automatically detect the File Type.

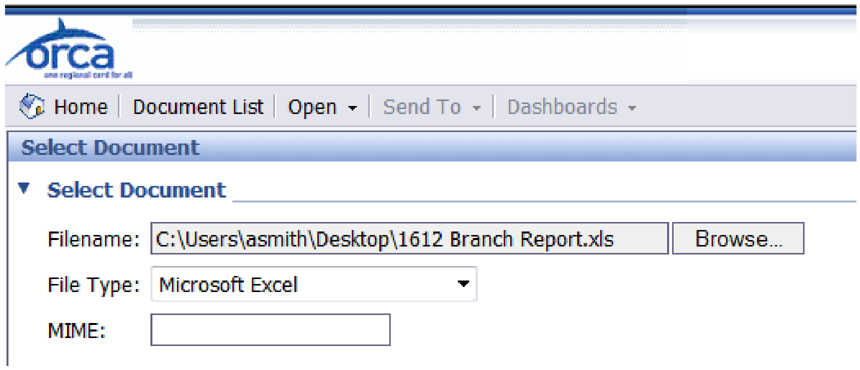


Figure 17: Select Document

5. Expand the General Properties and enter additional information as desired. The text entered in Description will appear beneath the file name in the Document List. This is particularly useful if an “Other” file type is selected – the user can explain what the file type is in this section so other users will be informed. Keywords can be entered so the object can be located more easily upon performing a Search within InfoView.

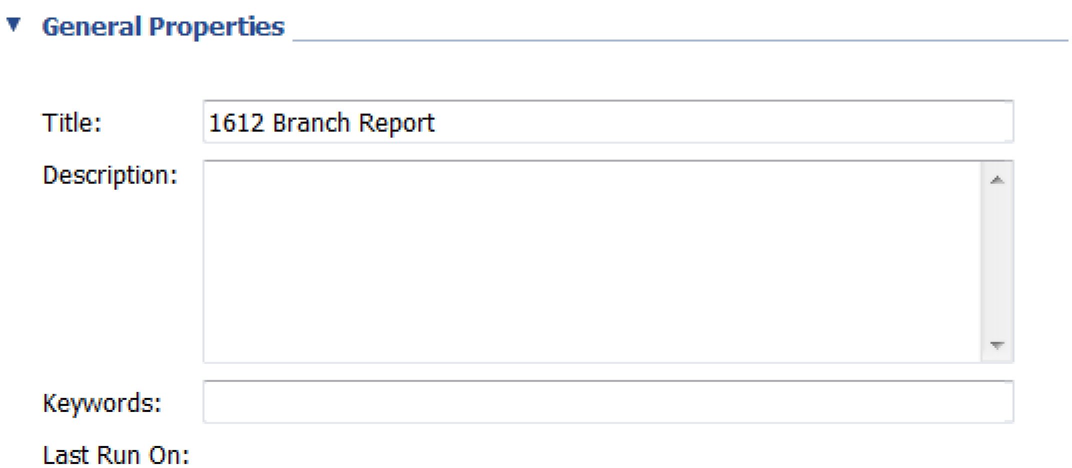


Figure 18: Select Document – General Properties

6. Categories is not used – so choosing this option is unnecessary
7. Once all appropriate information is entered, select OK to upload the file

3.4.2.5 Organize

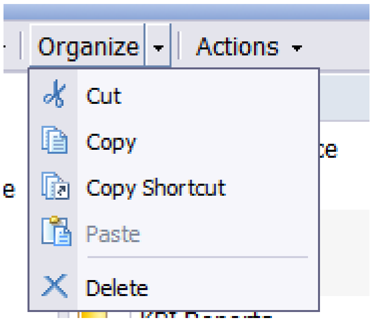


Figure 19: Organize Menu

The ability to "Organize" appears in multiple locations within InfoView. When available, you can cut, copy, copy shortcut, paste, or delete objects within the reporting system. If an option is not available at all for an object or location, the Organize menu will be grayed out. When at least one option is available for an object or location, the menu will be active.

- Cut – When an object is selected that the user owns, it can be Cut and later pasted to a new location. If the user doesn't own the object (creator), an error message will appear if Cut is selected.

Note: Selecting Cut will not remove the object from the current location until it is pasted somewhere else.

- Copy – When an object is selected, it can be copied to a new location. All objects (folders as well as files) can be copied within InfoView. When selected, the object is available to be pasted to another location in which the user has permission.

Note: When an object is copied, any changes made to the ORIGINAL object will NOT be reflected in the copy.

- Copy Shortcut – When an object is selected, a user can create a shortcut to that object and paste the shortcut in their personal folder.
- Paste – When a user selects to Cut, Copy, or Copy Shortcut an object, the second step is to Paste the object to a location in which the user has appropriate permission. These locations consist of the My Favorites location and the shared Agency folder associated with the User ID (e.g. King County Metro Shared). Users do NOT have permission to paste objects in the Auto Generated Reports or On Demand folders.
- Delete – An object (file or folder) can ONLY be deleted by the owner (creator). If an attempt is made to delete an object the user does not own, an error message will appear.

Cut/Copy/Copy Shortcut:

1. Navigate through the Document List and click the object to be cut/copied when displayed on the right side of the Workspace Panel
2. Select Organize from the menu bar OR right click the object and select Organize from the pop-up menu
3. Select the option to either Cut, Copy, or Copy Shortcut

Paste:

1. Navigate through the Document List to the folder in which the object is to be pasted

2. Highlight any object within the folder shown on the right side of the Workspace Panel or highlight the folder on the left side of the Workspace Panel
3. Select Organize from the menu bar OR right click and select Organize from the pop-up menu
4. Choose Paste

Delete:

1. Navigate through the Document List to the object to be deleted
2. Highlight the file or folder shown on the right side of the Workspace Panel
3. Select Organize from the menu bar OR right click the object and select Organize from the pop-up menu
4. Choose Delete
5. You will be prompted to confirm the deletion
6. Select OK to delete

Note: There is no ability to UNDO a deletion

3.4.2.6 Actions

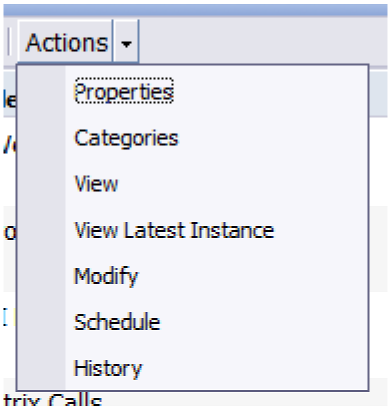


Figure 20: Actions Menu

As with Organize, the Actions menu will also often be available as a right-click pop-up menu throughout ORCA Reports. Also, depending on the object, not all Actions will appear.

- Properties – Depending on the object, the Properties will display the Title of the Object, a system generated ID, the File Name as stored on the report server, a Description of the Object, any associated Keywords, the date the Object was Created, Last Modified, and Last Run.

Note: If the logged in user is the owner (creator) of the report, the Title, Description, and Keywords are editable fields.

- Categories – Not applicable as Vix does not utilize Categories within ORCA Reports.
- View – Generates the report on demand with current data. See section 3.5.1.
- View Latest Instance – Opens the most current saved instance of the report containing data as of the time the report was generated. See section 3.5.4.

Note: This option only appears when at least one scheduled instance of a report exists

- Modify – Opens the report in Web Intelligence so that it can be modified. This is explained in SEA-04566 Ad Hoc Report Operations Manual [7] and is not covered in this document.

Note: This option will only appear when the logged in user owns (created) the report

- Schedule – allows the user to schedule the report to generate in the background and saves the instance in the report's history. See section 3.5.5.
- History – contains a list of all scheduled instances of a report and the status of each instance. The History is explained in section 3.5.6 of this document.

Note: This option only appears when at least one scheduled instance of a report exists

3.4.3 Search

If the location of a report or folder is unknown, there is a search tool available to locate the object.

At the top of the Document List Workspace Panel, the search bar allows you to search by **title**, **keywords**, or by using **advanced options**.

Figure 21: Object Search

To search for an object:

1. Choose (highlight) the starting location from the Document List. The search will be performed on all subfolders beneath the starting location.
2. Enter the search string in the **Search** box.
3. Click the drop down arrow next to the default "Search title" text and select where to search if not the Title:

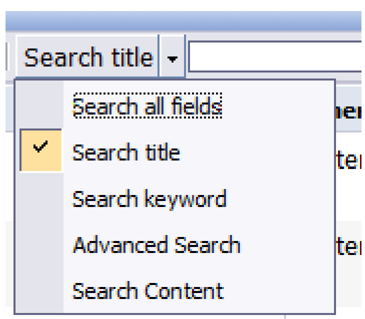


Figure 22: Search Options

- **Search All Fields –** Uses the text string to search the title, description, and keywords of the objects
- **Title** – Searches for the search string in the object title
- **Keyword** - Searches for the text string in the keywords associated with the object
- **Advanced Search** – launches a new Workspace Panel in which advanced searching options are available such as multiple locations, object owner, object type, and modification date/time.

Note: It is not necessary to enter a value in the Search box if you are choosing Advanced Search.

- **Content** – Not activated for use – will return 0 matches.

4. Search results are displayed on the right side of the Workspace Panel and a new location appears in the document tree on the left side of the Workspace Panel. You can navigate away from the search results, then click on the new tree entry to return to those results. You can also further refine your search within the results by searching again.

5. When you let the mouse hover over a specific object title, the description will appear in a pop-up bubble so you can determine if the object is the correct one. Additional information about each object appears in columnar format including:

   - The folder path of the object
   - The last run date of the object
   - The object type
   - The object owner
   - How many instances exist in the object's history

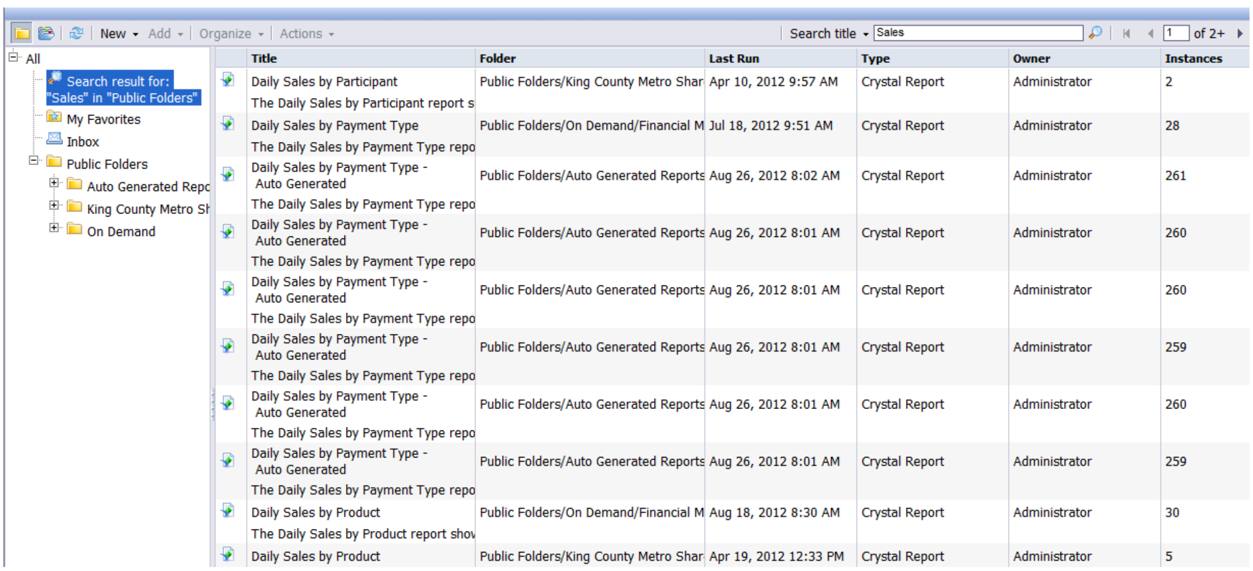


Figure 23: Search Results

3.4.4 My Favorites

Every user in ORCA Reports has their own personal folder location. This folder is only visible and accessible by the logged in User ID. This folder cannot be shared, and the objects within it are not available to other users. Users can create subfolders, add local documents, create and save ad hoc queries, and copy other objects to this folder.

3.4.5 Inbox

The Inbox is a location in which instances, not objects, can be stored. When scheduling an instance (section 3.5.5), the Inbox can be a destination for the instance rather than being stored in the object's history. Additionally, a user can send generated instances to another user's Inbox for viewing. The Inbox destination is detailed in section 3.5.5.6.1.

3.5 Manipulating Reports

A standard set of reports are created and maintained by Vix. These reports either auto generate at specific times/dates, or are available to be run on demand with current data. For a list of all available auto generated reports, their generation schedule and format, please reference SEA-06063 Auto Generating Report Configuration [9]. For a list of all on demand reports, please reference SEA-04547 RFCS Online Reporting Configuration [6].

Auto generated reports are scheduled to run at specific times by the BOEXI Administrator. The only Actions available when accessing these reports are **View Latest Instance** and **History**. Auto generated instances are not able to use the Send To option from the Header Panel. The majority of the auto generated report instances are in Adobe Acrobat (PDF) format. The computer being used to access ORCA Reports must have an Adobe viewer installed in order to successfully view an instance. If the report instance does not open, it is most likely that the viewer needs to be installed first.

An on demand report has Actions available in addition to those of an auto generated report. These report Actions, as initially introduced in section 3.4.2.6, are as follows:

- **Properties**
- **Categories**
- **View**
- **View Latest Instance**
- **Schedule**
- **History**

3.5.1 Properties

Selecting Properties will display the report title, ID, File Name, Description, Keywords, and various dates associated with the report.

Note These fields cannot be altered in any way, and this data is informational only.

3.5.2 Categories

Categories are not used within ORCA Reports and selecting this Action will yield no results.

3.5.3 View

The **View** option runs a report instance on demand against the most current data available in the database. Once the instance window is closed, it **is not saved** and cannot be viewed again unless regenerated. However, the instance can be exported and saved to a local file location before the results window is closed, if desired.

Note: If the ActiveX or JAVA viewer is selected in Preferences (Crystal Reports), the FIRST time a report is viewed, the user may be prompted to download the necessary ActiveX or JAVA controls if not already loaded (providing Internet Explorer (IE) security settings are not disabling this feature). Once downloaded and installed (follow onscreen instructions), this step will not be required again from the machine in which the report was viewed.

To view a report on demand:

1. Click the Report Title to highlight the report.
2. Select **View** from the Actions menu bar OR right-click and select View from the pop-up window OR double-click the report title.

- If parameters are required, a window similar to the one in Figure 24 appears. Provide the requested information then select **OK** to generate the report.
- If no parameters are required, the report generates immediately and the result is displayed in the Workspace Panel by default (this can be changed in the user Preferences to display in a separate window if desired – see section 3.3.1.1).

Figure 24: Parameter Requirement

Note: Based on the complexity of the report and the parameters provided, a result may be immediate or require many minutes for processing. If a result has not been returned after several minutes, you may want to consider canceling the report and scheduling it to run in the background or applying stricter parameter values. If a timeout message appears, the resources needed for a result are not available or the report/data is too complex to complete in a reasonable amount of time and must be scheduled to run in the background.

Figure 25 is an example of a successfully generated on demand report.

Figure 25: Example of On Demand Report

The menu options for the result are:

- Export the report
- Print the report
- Parameter panel (only applies to ad hoc queries)
- Navigation buttons
- Refresh report results
- Zoom
- Search

3.5.3.1 Export 

To export report results to a specified format:

1. With the report result displayed, click the **Export** icon.

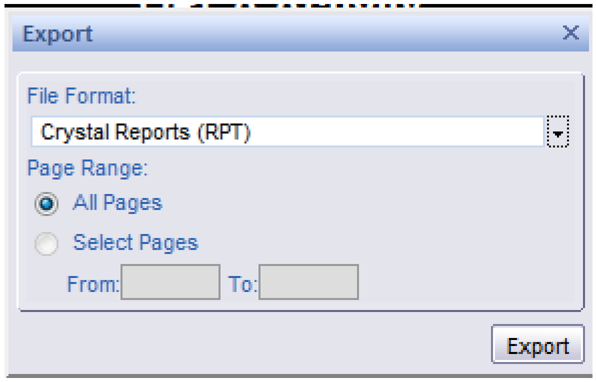


Figure 26: Export Dialogue Box

2. From the **Export** dialog box, click the file format drop down arrow to select the desired format.

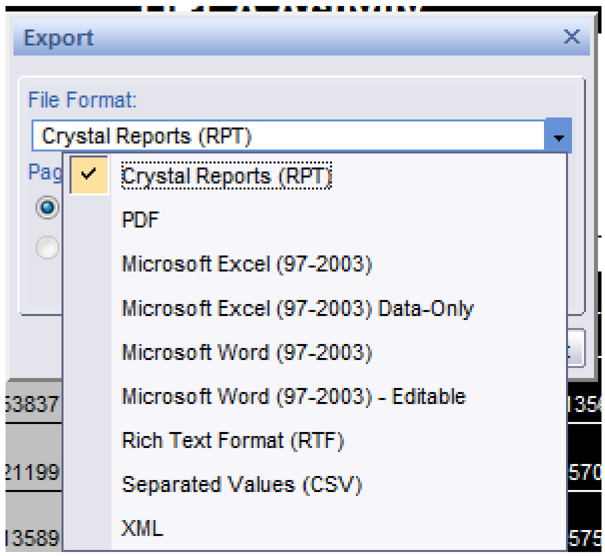


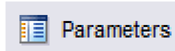
Figure 27: Export File Formats

3. Select the page range for the report.
4. Click **Export**.
5. You will be prompted to open or save the exported report. Select the preferred option and location (if saving). Depending on the browser that is being used, this can be displayed in many different ways and will be no different than downloading from any other website.

3.5.3.2 Print 

To print report results to a local printer:

1. With the report result displayed, click the **Print** icon.
2. In the **Print Setup** dialog box, select the printer for the report.
3. Select a page range for printing (default is **All**). Change any other printing options as desired.
4. Click the **Print** button to send the report to the designated printer

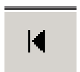
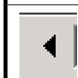
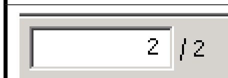
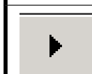
3.5.3.3 Parameter Panel 

When an ad hoc query built using Web Intelligence is generated, the owner of the query can set up run-time parameters. This is not a common occurrence, and any questions on the parameters should be directed to the owner of the ad hoc query. Creating a run-time parameter is covered in SEA-04566 Ad Hoc Report Operations Manual [7].

3.5.3.4 Navigation 

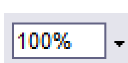
Table 6 describes the different navigational buttons.

Table 6: Navigational Buttons

Option	Description
	Goes to the first page of the report results (unavailable when on the first page).
	Goes to the previous page of the report results (unavailable when there are no previous pages).
	Jumps to the specified page number. The total number of pages displays. This example shows a jump to page 2 of a two-page report.
	Goes to the next page of the report results (unavailable when there are no next pages).
	Goes to the last page of the report results (unavailable when on the last page).

3.5.3.5 Refresh 

You can refresh the report result and change the parameters without closing and rerunning the report. Simply select the **Refresh** icon, and you will be returned to the parameter window with the current parameters already selected. Change the desired parameter(s) and select OK to regenerate the report.

3.5.3.6 Zoom 

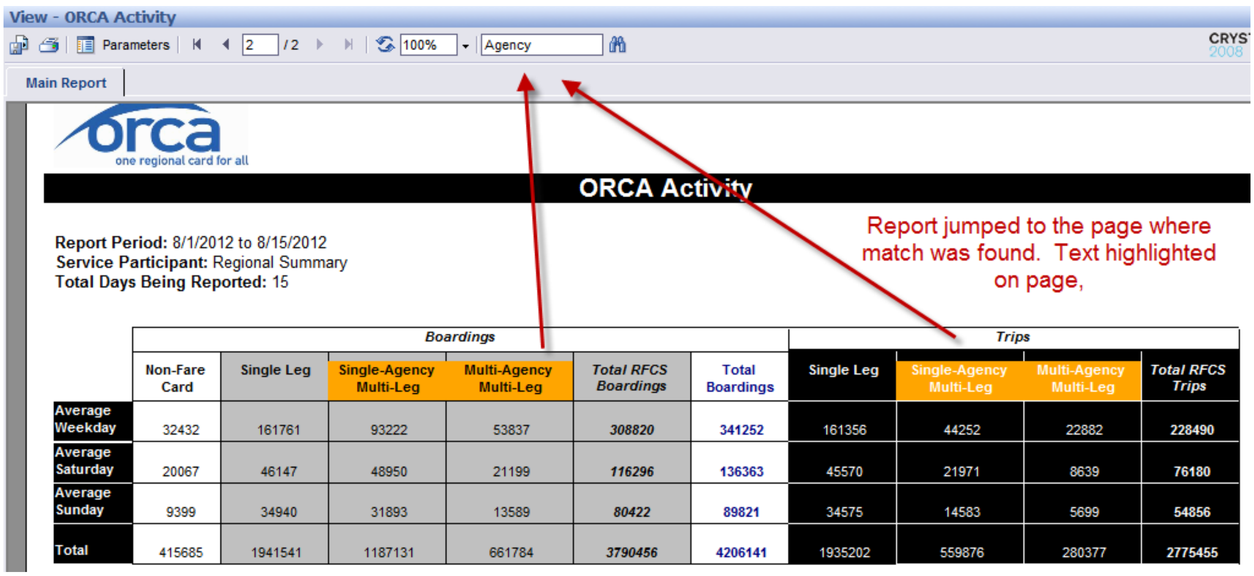
Allows the user to Zoom In or Zoom Out on the results. The predefined zoom levels are (Out) 25%, 50%, 75% and (In) 100%, 125%, 150%, 200%, 300%, 400%. You can also manually type a zoom value for more granular zoom levels by typing a value in the zoom box and pressing the Enter key.

3.5.3.7 Search 

In addition to standard report options and navigational tools, you can search for specific text within a report. All fields are searched including titles, header, and footer details. When a match is found, the page immediately becomes active and the matching search string is highlighted.

Note: If no results are found, the phrase "End of Search" will appear in the Search box and no results will be highlighted.

Figure 28: Search Dialog Box



	Boardings						Trips			
	Non-Fare Card	Single Leg	Single-Agency Multi-Leg	Multi-Agency Multi-Leg	Total RFCS Boardings	Total Boardings	Single Leg	Single-Agency Multi-Leg	Multi-Agency Multi-Leg	Total RFCS Trips
Average Weekday	32432	161761	93222	53837	308820	341252	161356	44252	22882	228490
Average Saturday	20067	46147	48950	21199	116296	136363	45570	21971	8639	76180
Average Sunday	9399	34940	31893	13589	80422	89821	34575	14583	5699	54856
Total	415685	1941541	1187131	661784	3790456	4206141	1935202	559876	280377	2775455

Figure 29: Search Results

3.5.4 View Latest Instance

When a report is scheduled (see section 3.5.5) and there is at least one saved instance, the most recent instance can be viewed with a single click. Scheduled instances of a report are saved on the server and can be opened when desired.

To view the latest instance of a report:

1. Click the Report Title and select **View Latest Instance** from the **Actions** menu option OR right-click the Report Title and choose **View Latest Instance** from the pop-up menu.
2. A new window opens in the application associated with the report format (e.g. Adobe Acrobat, MS Excel, etc…) that displays the most recent instance of the report.

Often the report will open in an application other than the Crystal Report Viewer in the Workspace Panel (i.e., Adobe Acrobat). In fact, the most common format for auto generated reports is Adobe Acrobat. Regardless of the format, the associated application or an application viewer (such as Adobe Viewer) must be loaded on the client machine in order to view the report results.

Based on the application that is launched when viewing the report, the viewing tools available are those within the associated application. If the Crystal Reports Viewer is used (Crystal Report format), all viewing options as detailed in section 3.5.3 are available.

When the instance is closed, it will still be available for future viewing by selecting the **History** option. It will only be available as **View Latest Instance** when no other instance has since been scheduled.

3.5.5 Schedule

Reports are scheduled for many reasons. The primary reason is that some reports take a very long time to generate due to their complexity (e.g., data accumulation, formulas, or sub reports). These reports should not be viewed on demand, as they often time out before a successful result can be obtained.

Other reasons for scheduling a report include (but are not limited to):

- Having report results distributed to specified recipients as an email attachment (access to the online reporting system is not required in order to view the attachment)
- Reports can be set to run at an off-peak time to reduce the strain on system resources
- The report instance is saved on the reports server and can be accessed as needed without having to rerun the report

To schedule a report:

1. Highlight the Report Title and select **Schedule** from the **Actions** menu OR right-click and choose **Schedule** from the pop-up window.
2. The **Schedule** Workplace Panel opens.

Referencing Figure 30 below, the Schedule Workspace Panel contains up to nine different options that can be altered. Based on the selected option, the right side of the panel will change accordingly. Once all options are set, clicking **Schedule** in the bottom right will put the report in queue for generation.

3. Choose the relevant option(s):
   - **Instance Title –** The name associated with the instance being scheduled.
   - **Recurrence** – Identifies *when* the report will generate.
   - **Parameters** – Required information (when parameters exist) that the report needs in order to generate.
   - **Filters** – Lists all data filters that the primary report uses. However filters will *not* be visible that are used within any sub reports.
   - **Format** – Identifies *what* format the report result will use.
   - **Destination** – Specifies *where* the report instance will go.
   - **Print Settings** – Identifies if the report is to print when it generates and allows for changes to printer settings.
   - **Events –** Used to define what events are to occur prior to the instance generating (not available to ORCA Reports users).
   - **Scheduling Server Group** – Not used as there is only one Server Group associated with ORCA Reports.

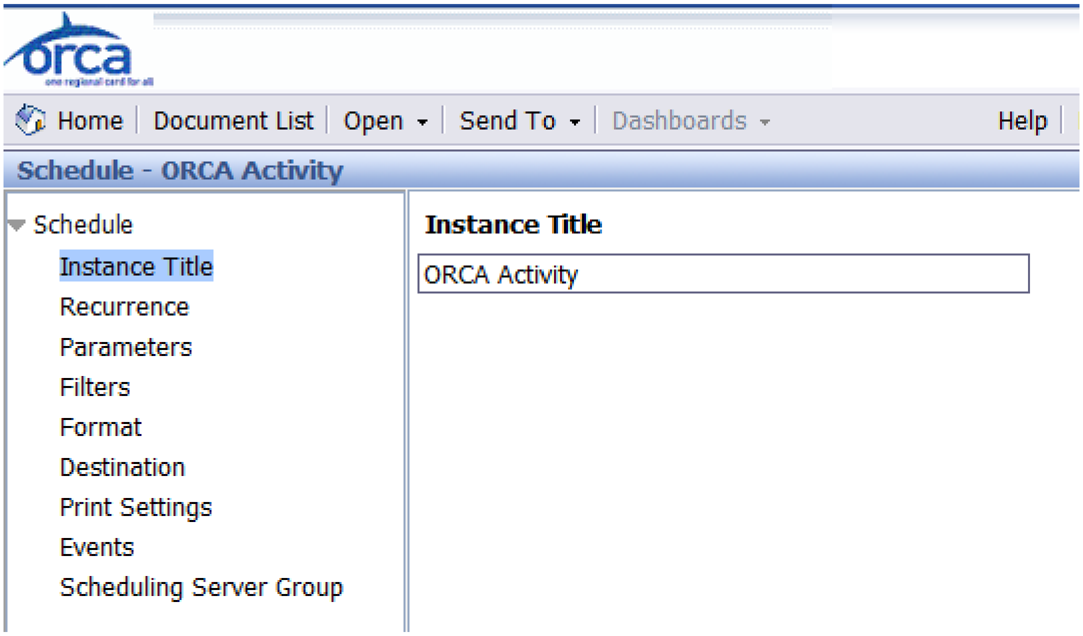


Figure 30: Schedule a Report

3.5.5.1 Instance Title

As instances are only differentiated in the History window based on the time of generation, sometimes changing the title to be more descriptive can help locate the instance more easily (e.g. "ORCA Activity for March 2012 for KCM"). By default, the Instance Title is the same as the Report Title.

To change the Instance Title, simply enter the value in the text box before proceeding to the next scheduling option.

3.5.5.2 Recurrence

Use the **Recurrence** option to indicate *when* the report is to generate. Based on the run-time parameter selected, additional information may be required.

Figure 31 and Figure 32 illustrate additional information that is needed when setting the **Daily** run-time parameter.

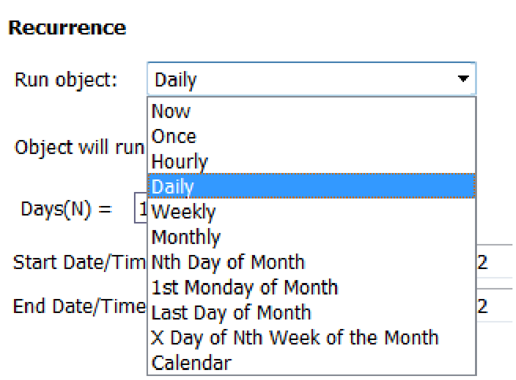


Figure 31: Selecting Daily Run-Time

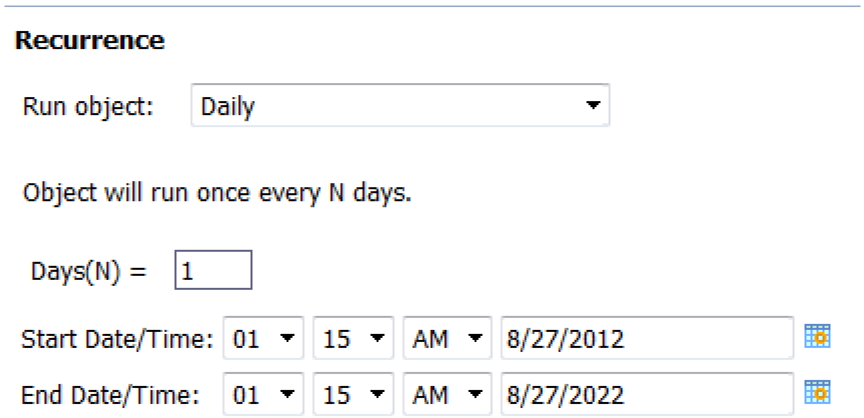


Figure 32: Daily Run-Time Settings

As shown in Figure 32, you can set the report to run on a daily basis or every *N* days. For example, a report to run every other day would have **2** entered in the **Days(N)** text box. Additionally, you can specify the time of day when the report generates. The default is the current time and this can be adjusted as desired.

The first date the report begins generating defaults to the current day, but this can also be adjusted by clicking the calendar icon and choosing the desired start date. The end date defaults to a ten-year duration and doesn't have to be adjusted unless the specific end date is known.

Note: If the start date of the report is the current day, the report is scheduled to generate immediately if the start time has already passed.

3.5.5.3 Parameters

Use the **Parameters** option to provide the information the report requires in order to generate. With very few exceptions, all reports require at least one parameter. If the parameter information is not provided, the report instance will FAIL immediately.

To set the parameters needed for a report, select **Parameters** from the options list as shown in Figure 33. Based on the report, the right side of the panel changes to reflect the information required in order to generate.

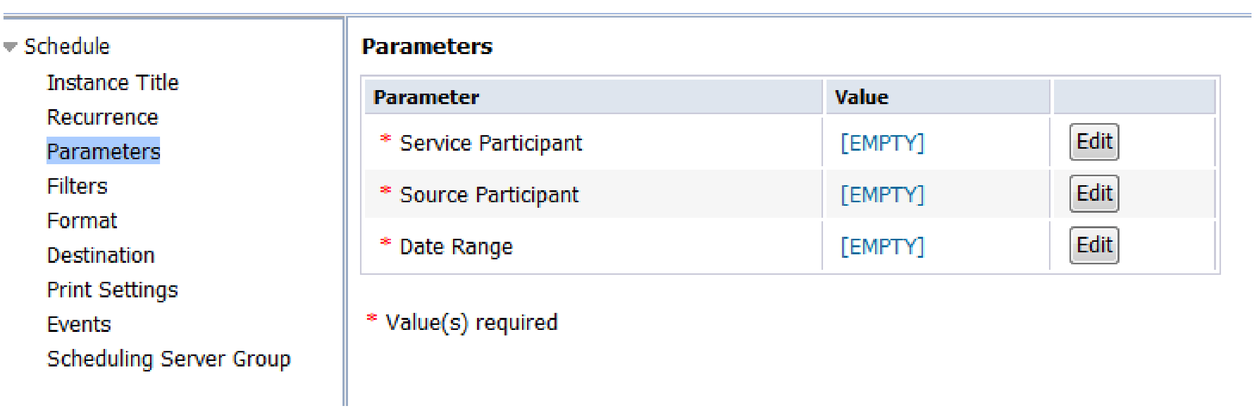


Figure 33: Parameters

Note: Required parameters are identified with a red asterisk next to the parameter name.

The Value of each parameter will be [EMPTY] unless there is a default value associated based on the design of the report. To change a default value or provide a value for an

[EMPTY] parameter, you can either click the work [EMPTY] (hyperlink) or choose the appropriate **Edit** button.

Figure 34 displays a **Date Range** parameter required for the selected report. When supplying a date range parameter, a small calendar icon appears next to the **Start of range** and **End of range** text boxes. Unless you are familiar with the format of the Crystal syntax needed when supplying a date parameter, it is highly recommended that you use the provided calendar icon. When selected, the date populates the text box in the required format. Once you select the date range, you MUST press the **OK** button to set the value. When successful, the **Value** now displays the date range (not [EMPTY]) in the Parameter list.

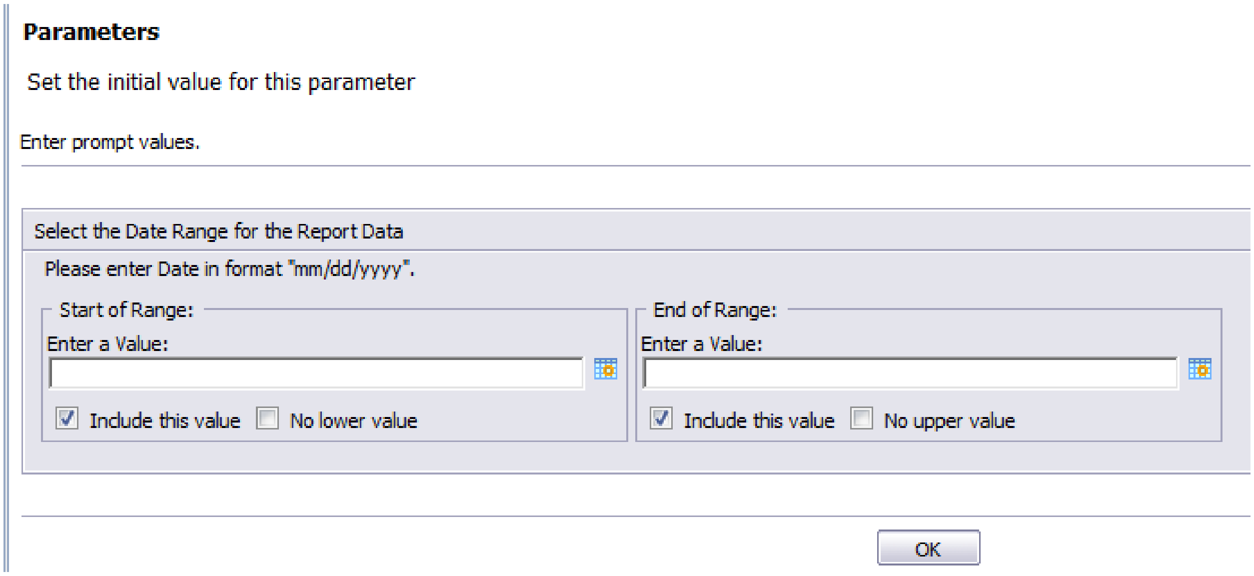


Figure 34: Parameter Settings

Note: Be sure to double check that all required parameters are populated before scheduling a report. Failing to set all parameters will cause the report instance to FAIL immediately.

3.5.5.4 Filters

Select **Filters** to see the filters associated with the report (see Figure 35). You can manipulate these filters and/or apply additional filters. However, if a report contains a subreport (a report within a report) the filters associated with the subreport are not visible and cannot be manipulated.

Note: When you manipulate a filter, the code must be written in Crystal syntax. If the filter is written incorrectly, the scheduled report will fail. Manipulating the filters ONLY affects the instance being scheduled, and it does not affect the primary report file.

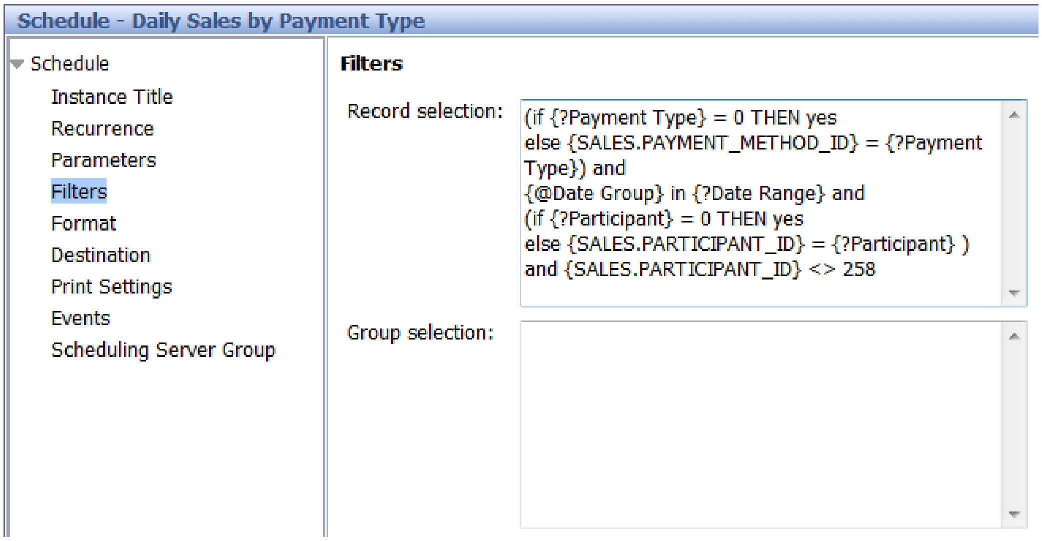


Figure 35: Filters

In Figure 35, this report is filtering on a date range and other parameter values – as indicated by the {?Parameter name} syntax.

If a different filter value is desired, the value can be manually altered so the selected parameter value no longer applies. However, if a valid value is unknown or entered incorrectly, this may cause the report to generate with no results or FAIL completely.

The **{?Date Range}** value can be replaced with other predefined date ranges in Crystal syntax. An example of commonly used date ranges are:

- **MonthToDate**
- **YearToDate**
- **WeekToDate**
- **LastFullMonth**
- **LastFullYear**
- **Last7Days**
- **CurrentDate**
- **DataDate**

You can also force the report to generate data for the prior day by using the following formula:

{?Date Parameter Name} = (CurrentDate-1)

When scheduling a report to run on a recurring basis, more than likely you will want to change any date parameters to use the predefined values above.

3.5.5.5 Format

When you schedule a report the default **Format** is the Crystal Reports format that uses the Crystal Viewer in the Workspace Panel - which can then be exported to a number of other formats (see Figure 27). In order to view an instance in Crystal Reports format, the user must be logged into ORCA Reports.

The report instance can also be set to generate in a specific format when scheduled so it can be accessed outside ORCA Reports. This would be required if the report is scheduled to a destination other than the Default Enterprise Location. Additionally, the user accessing the instance must have a locally installed version of the program associated with the report format. Some of the available formats are Microsoft Excel, Adobe Acrobat, and Microsoft Word (see Figure 36 for other available formats).

When an instance is scheduled to generate in a non-Crystal format, viewing the instance through launches the application associated with the report instance file type.

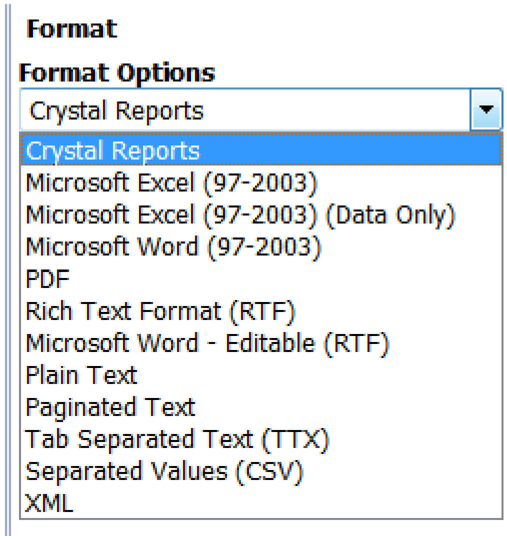


Figure 36: Available Formats When Scheduling

Based on the selected format, there are often additional options that can be adjusted. Each format may have different options based on the associated program. Figure 37 illustrates the information you can provide when selecting the Microsoft Excel (97-2003) format. As an example, it is recommended to choose **Once per Report** when exporting headers and footers to Microsoft Excel.

Note: In order to adjust format options, you must UNCHECK the “Use the export options defined in the report” box.

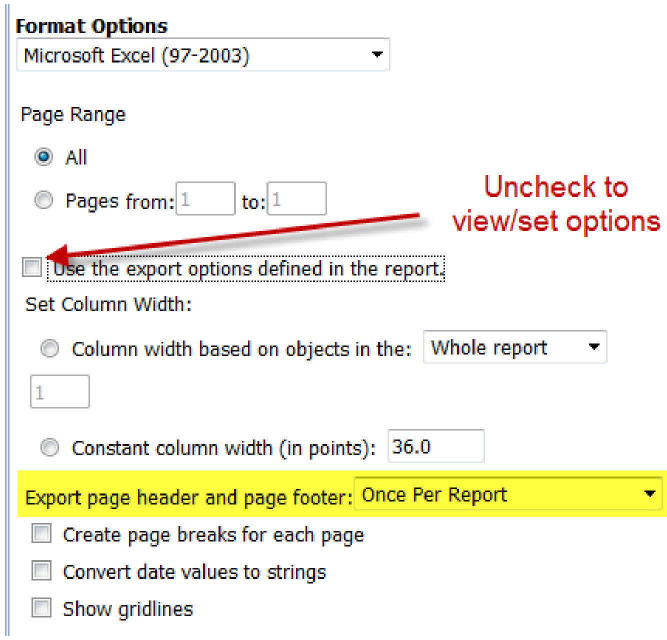


Figure 37: Additional Information When Selecting a Format

3.5.5.6 Destination

When you schedule a report, the Default Enterprise Location destination is the report server. The report instance is only available when a user logs in to ORCA Reports. However, there may be times when you want the report instance to be viewed outside of ORCA Reports, or perhaps the results need to be provided to a user not registered on the system.

There are four other **Destination** options (see Figure 38):

- **Business Objects Inbox –** The instance can be sent to your default personal Inbox, or another ORCA Reports user in which you have permission to send information.
- **Email** – Sends the instance to specified recipient(s) as either an email attachment or a hyperlink to the online instance.
- **FTP Server** – Sends the instance to a specified FTP location.
- **File System** – Sends the instance to a specified file location on the local machine.

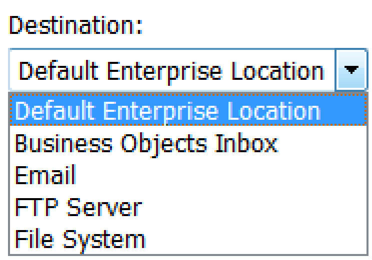


Figure 38: Default Destination Option

3.5.5.6.1 Destination – Business Objects Inbox

Each user in ORCA Reports has an Inbox that behaves similar to an inbox used with email programs. The user can create folders to organize messages, and forward messages to other users.

When a report is scheduled to an Inbox destination, two initial options will appear that are selected by default:

1) Keep an instance in the history – unchecking this box will cause the instance to NOT display in the History window of the associated report. The instance will reside ONLY in the Inbox of the recipient.
2) Use default settings – the instance will be sent to the current logged in user's Inbox. Unchecking this box would allow another user's Inbox to be selected, however this option is not available due to security permissions associated with different reports.

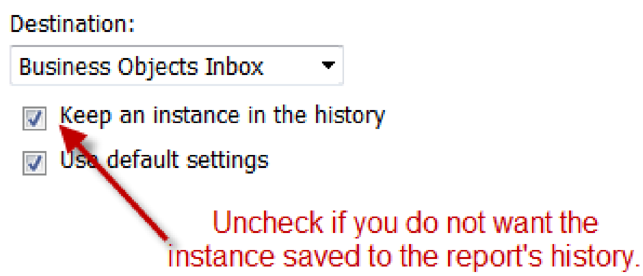


Figure 39: Business Objects Inbox

3.5.5.6.2 Destination – Email (SMTP)

As with the Inbox, there are two options already selected when Email destination is selected:

1) Keep an instance in the history – unchecking this box will cause the instance to NOT display in the History window of the associated report. The instance will only reside as an attachment in the email of the recipient.
2) Use default settings – You MUST uncheck this option. There are no default settings for Email destination. Failure to uncheck this box will not cause the instance to fail, however the instance will never reach a destination.

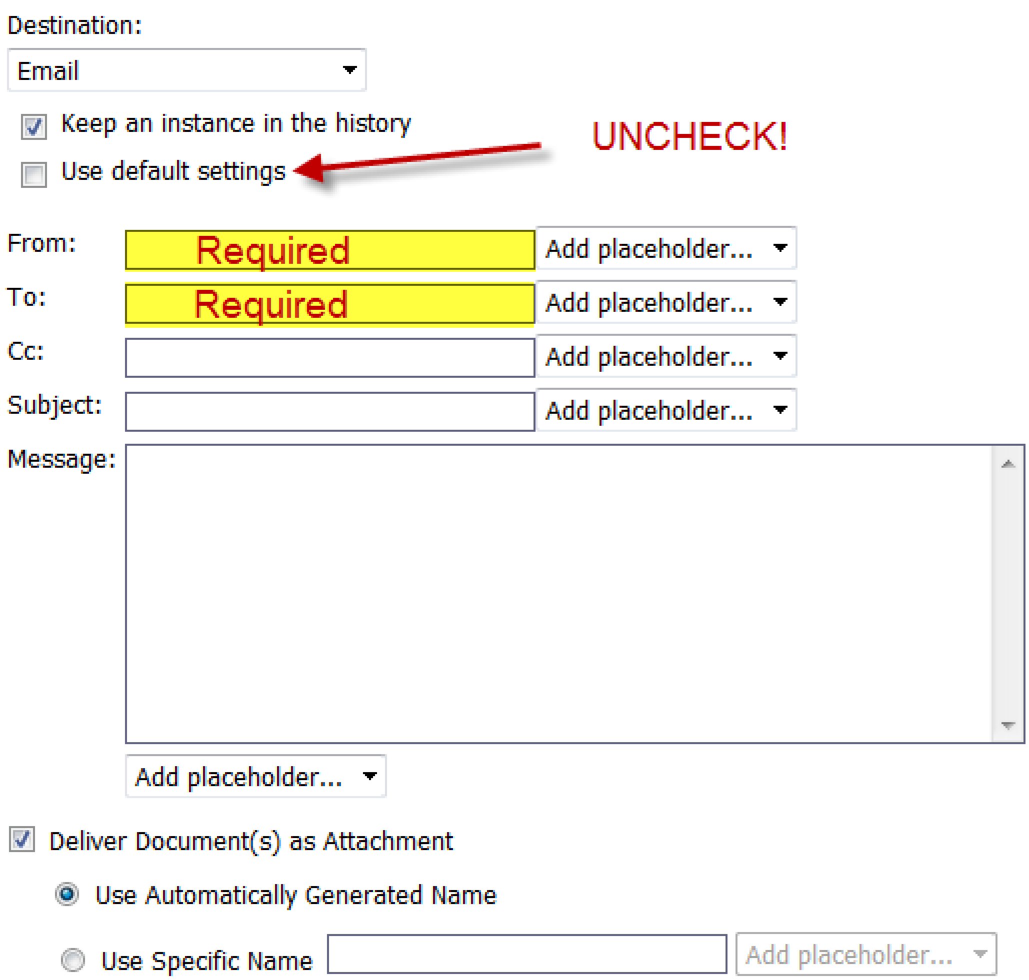


Figure 40: Example of Email (SMTP) Destination Option

When you schedule a report instance to **Email** (see Figure 40), the only required information is the **From** and **To** addresses. These addresses must contain an @ symbol followed by a period in order to be recognized as a valid email address, but the actual address is not validated. The **From** address will appear as the sender of the message, and if the recipient sends a reply, this is the address that will receive it.

Note: Some internal firewalls and email servers consider certain addresses to be spam and the message may be discarded before reaching a recipient. It is always good practice to use a valid email address that the recipient's server will recognize and allow.

The **Subject** field is not required to schedule the report successfully, but many spam programs discard messages without a subject. It is highly recommended to include a **Subject** when scheduling. Additionally, the **Message** field is also not required, but it is also recommended to put in a few words regarding the report being sent.

By default, the report instance is sent as an attachment with the email. However, this option can be deselected and a hyperlink can be included within the message body instead. This hyperlink directs the recipient to the ORCA Reports where the instance can be viewed. A valid user ID and password for ORCA Reports is required in order to log in to the system and view the instance.

Note: Many fields have an option to include a "placeholder." The available placeholders are:

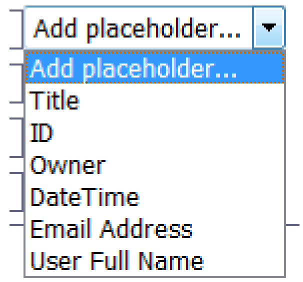


Figure 41: Placeholders

Selecting one of these values will include the syntax in the associated text box that will display the selected option once the instance is successful. For instance, selecting “Title” will put the syntax “%SI_NAME%” into the associated text box, however when the instance is successfully emailed, “The Real Report Name” will now be where the placeholder was located.

3.5.5.6.3 Destination – FTP Server

Again there are two options already selected when FTP Server destination is selected:

1) Keep an instance in the history – unchecking this box will cause the instance to NOT display in the History window of the associated report. The instance will only reside as an attachment in the email of the recipient.

2) Use default settings – You MUST uncheck this option. There are no default settings for FTP Server. Failure to uncheck this box will not cause the instance to fail, however the instance will never reach a destination.

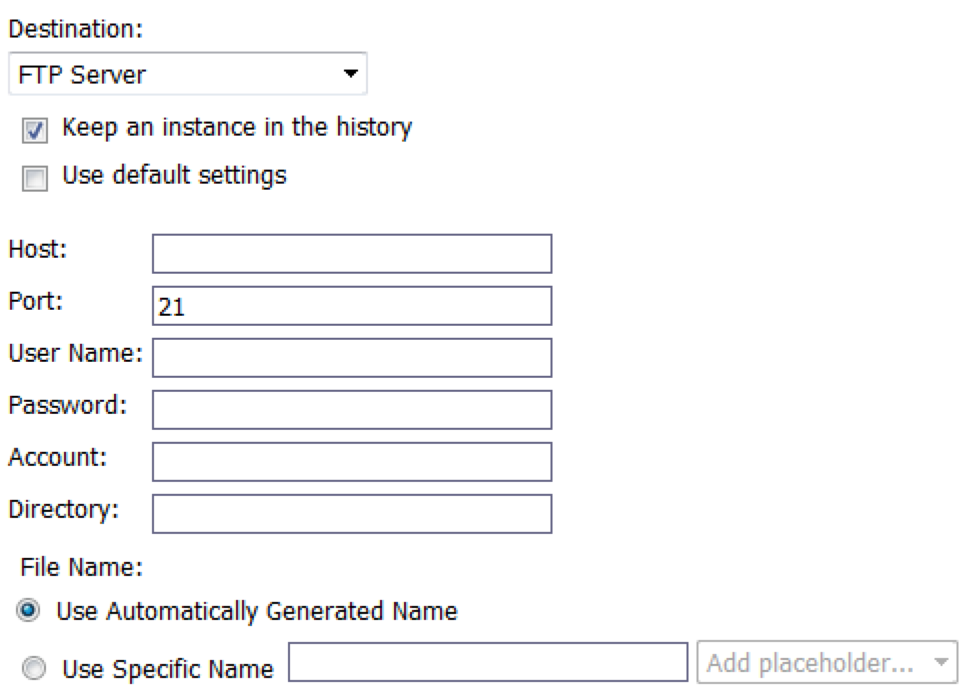


Figure 42: Example of FTP Server Destination Option

As shown in Figure 42, an **FTP** (File Transfer Protocol) location requires a **Host** string (e.g., 10.255.255.42), a **Port** (default of **21** should not need to be changed), and a valid **User Name** and **Password**. If any of this information is unknown, contact the System Administrator of the FTP site. The **Directory** is an optional value in which you can specify a subdirectory beneath the root FTP location if known. You can also elect to provide a specific file name if you do not want to have a non-identifiable auto generated name associated with the file (recommended).

3.5.5.6.4 Destination – File System

As with the other Destinations, here are two options already selected when File System destination is selected:

1) Keep an instance in the history – unchecking this box will cause the instance to NOT display in the History window of the associated report. The instance will only reside as an attachment in the email of the recipient.
2) Use default settings – You MUST uncheck this option. There are no default settings for File System. Failure to uncheck this box will not cause the instance to fail, however the instance will never reach a destination.

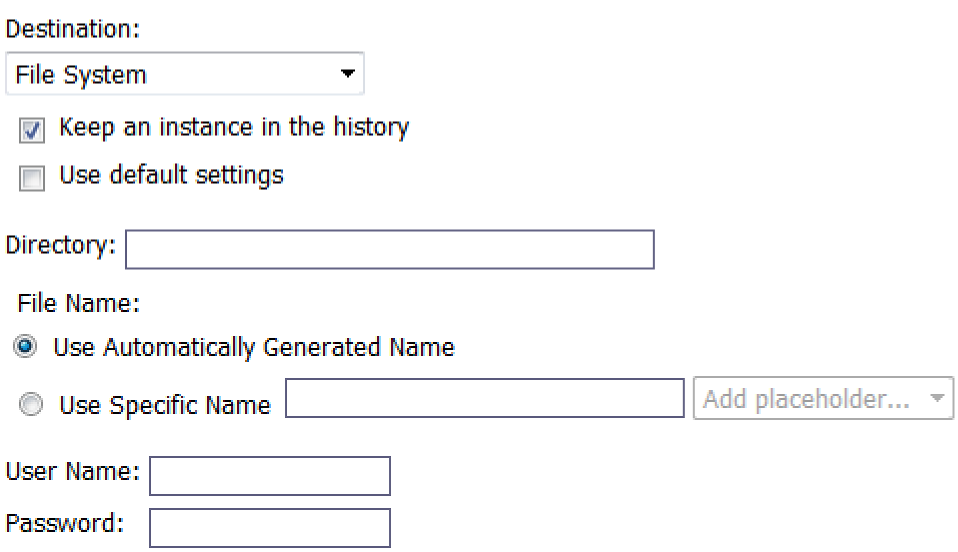


Figure 43: Example of File System Destination Option

When you choose the **File System** option (see Figure 43), you must provide additional information. The **Directory** is the location in which the report instance will be sent. This information is required in order to schedule the report successfully. The format of the path is relative to the Enterprise Job Server, so it must be formatted as a fully qualified network location.

You can opt for a randomly generated file name (which is a series of random letters and numbers) or supply a specific name. You can also add placeholders to the file name, such as **Title** or **Date**, that populate with the appropriate value (e.g., **Title** = report title, **Date** = current date, etc.). Simply click the drop-down arrow to select the placeholder, and click to populate the placeholder in the **Use Specific Name** text box.

The final requirement is to provide a **User name** and a **Password** if they are necessary to access the specified file location.

Note: This is NOT the user ID and password associated with accessing ORCA Reports.

3.5.5.7 Print Settings Option

When you schedule a report instance, you can set the **Print Settings** option (see Figure 44) so it will be sent to a printer and saved on the server when it generates. If the printed report is lost, the instance can be accessed and printed again later. A report always prints in Crystal Reports format, and the format selected during scheduling has no bearing on the printed report format.

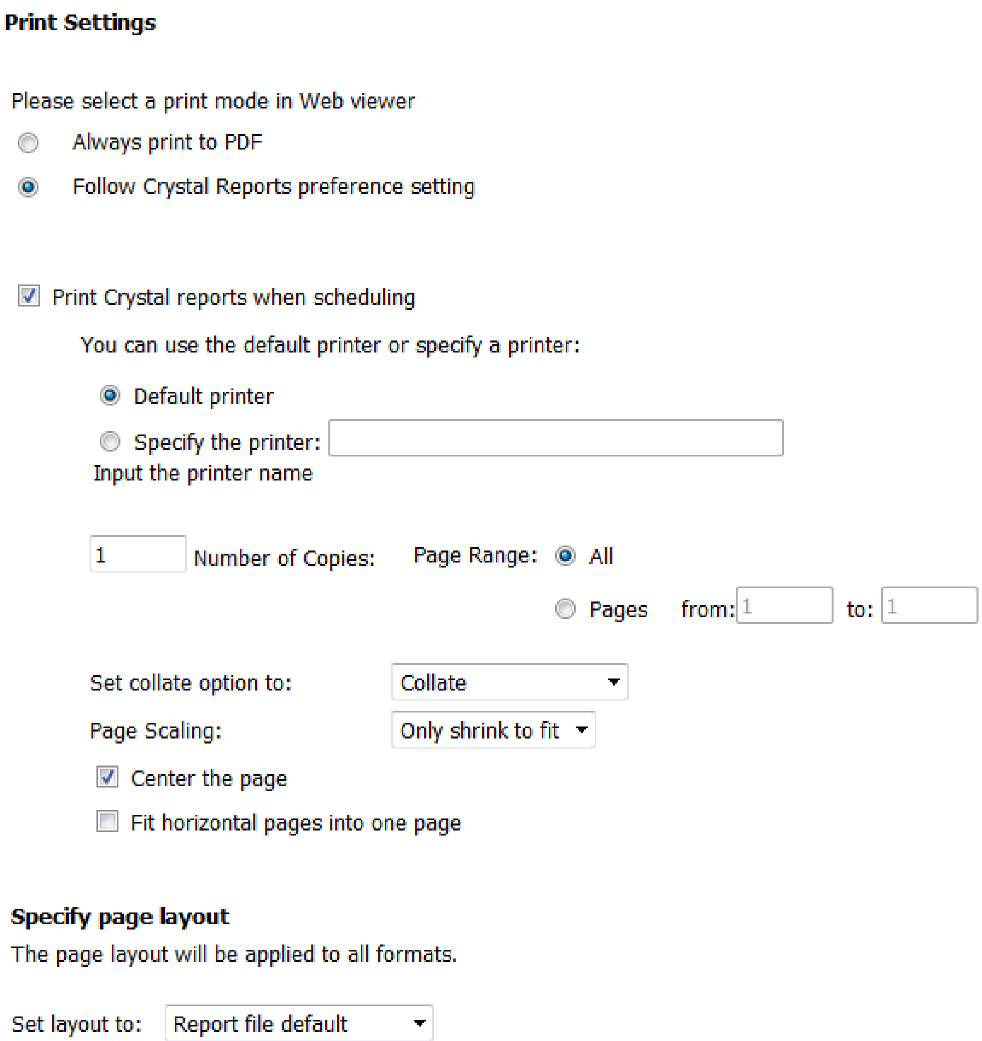


Figure 44: Print Settings Window When Scheduling a Report

Printer settings for report instances are similar to those in other applications. You can use the default printer associated with the local machine, or you can specify a different printer. The printer must be installed and accessible from the local machine.

Note: When choosing a specific printer, the path must be in the following format: **\\printserver\printername.**

Once all options have been appropriately set, the report can be scheduled to generate by selecting **Schedule** in the bottom right of the Workspace Panel. It may be a good idea to

perform a final review of all options to ensure there are no mistakes. Once you select **Schedule**, the Schedule panel closes and the **History** panel opens.

3.5.6 History

The **History** window appears when:

- A report is scheduled.
- **History** is selected from the Action menu or pop-up menu

If a report has never been scheduled and has no instances, the **History** window will be blank if available at all. However, if you are accessing an auto-generated report or a report that has been scheduled, the **History** window displays information regarding the existing report instances. Table 7 explains each area within the **History** window shown in Figure 45.

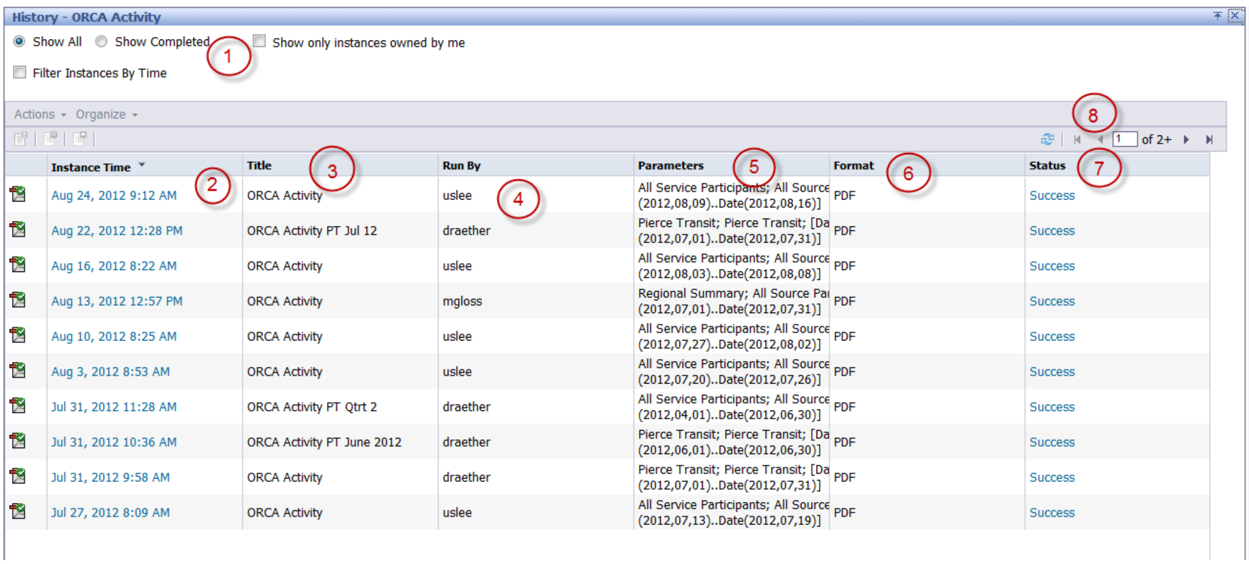


Figure 45: Example of History Window

Table 7. Working with Report History

Item	Feature and Description
(1)	**Show –** Provides the user the ability to only show instances that have completed and/or are owned by the user. Instances can also be filtered based on the completion time.
(2)	**Instance Time** – Lists all the instances that are available for viewing based on the date/time of generation. Each instance is a hyperlink.
(3)	**Title –** Displays either the default Report Title or the Instance Title as specified when scheduling the report.
(4)	**Run By** – Identifies who scheduled the report.
(5)	**Parameters** – When applicable, this area lists the parameters that were used in generating the instance.
(6)	**Format** – Indicates the format in which the instance was generated. The appropriate application associated with the format is launched when the instance is selected.

Item	Feature and Description
(7)	**Status** – Lists the status of the report (e.g., **Success**, **Pending**, **Failed**). **Note:** Only successful instances can be viewed when the Instance Time hyperlink is selected.
(8)	**Refresh/Navigation –** If a report is in Running status, you can select Refresh to see if it has changed status to Success or Failed. When the number of instances exceeds the "Set the number of objects (max.) per page" set in user Preferences, you will see X of 2+ appear and the navigation buttons will be available.

By default, the list of instances is sorted by the **Instance Time**. You can sort the list by other columns simply by clicking the column header to resort. Clicking once will sort in Ascending order, and a second click will sort in Descending order.

When scheduling a report, one of the most common errors is that the **Parameters** were not added prior to scheduling. This can be determined by looking at the **History** window to see if the area beneath **Parameters** is blank. If the area beneath **Parameters** is blank and the **Status** is **Failed**, it is almost guaranteed that it is because the parameters were not added before the instance was scheduled.

The parameters selected when the report was scheduled appear in the **Parameters** column, separated by semi-colons. It can be difficult to understand exactly what parameters were selected, but with experience, it becomes easier.

The options for the **Status** field are:

- **Success** – The report was scheduled successfully.
- **Failed** – The report did not generate.
- **Pending** – The report is queued but has not yet generated.
- **Running** – The report is generating now.
- **Recurring** – The report is scheduled to run on a repeating schedule.

The value in the **Status** column is also a hyperlink. When selected, the panel will change and provide more information regarding the status. The information of interest is usually the start time, end time, and duration for a successful instance, and the error message if a failed instance. Additionally, if the report status is **Recurring**, clicking the hyperlink provides more information on the report format, destination, and the next time the report will generate.

Note: When the error message begins with **information is required…**, this indicates that at least one parameter was not set correctly when scheduling the report.

3.6 My InfoView

My InfoView is a dashboard that the user can set up and view at any time while in ORCA Reports. This dashboard can contain not only report objects, but panels that access websites not associated or affiliated with ORCA Reports in any way.

You can build the My InfoView page as desired, and then make it the startup location in user Preferences for when logging in to ORCA Reports. To create a My InfoView dashboard, select Open from the Header Panel and choose **My InfoView**.

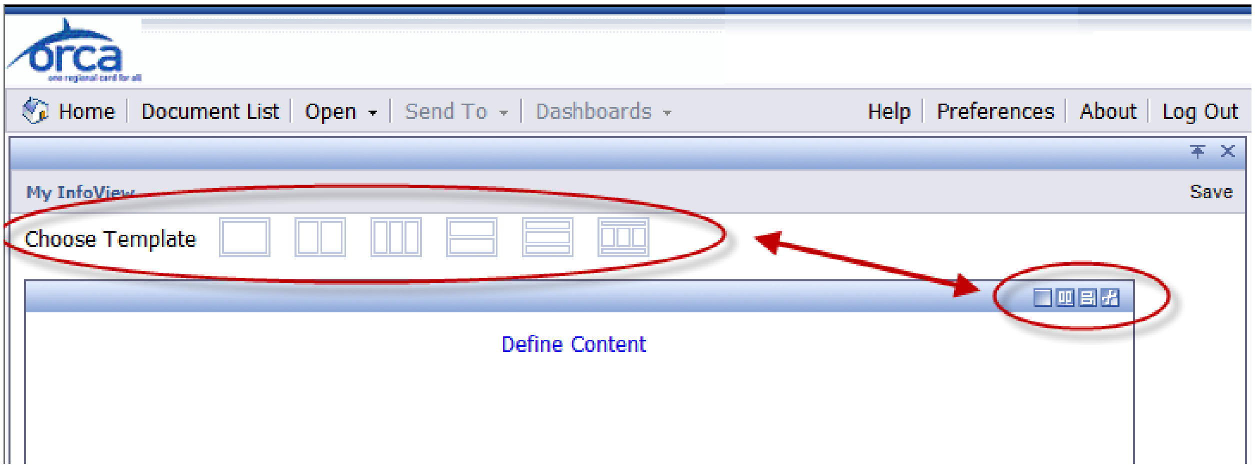


Figure 46: My InfoView

The top section prompts you to choose a template for your InfoView page. You can select from the predefined templates, or you can split the panels manually using the split icons in the top right of the inner panel highlighted in Figure 46. As you split panels, each new panel has its own set of split icons.

Each panel will have a hyperlink to "Define Content." Selecting this option will launch a new window entitled "Dashboard Properties."

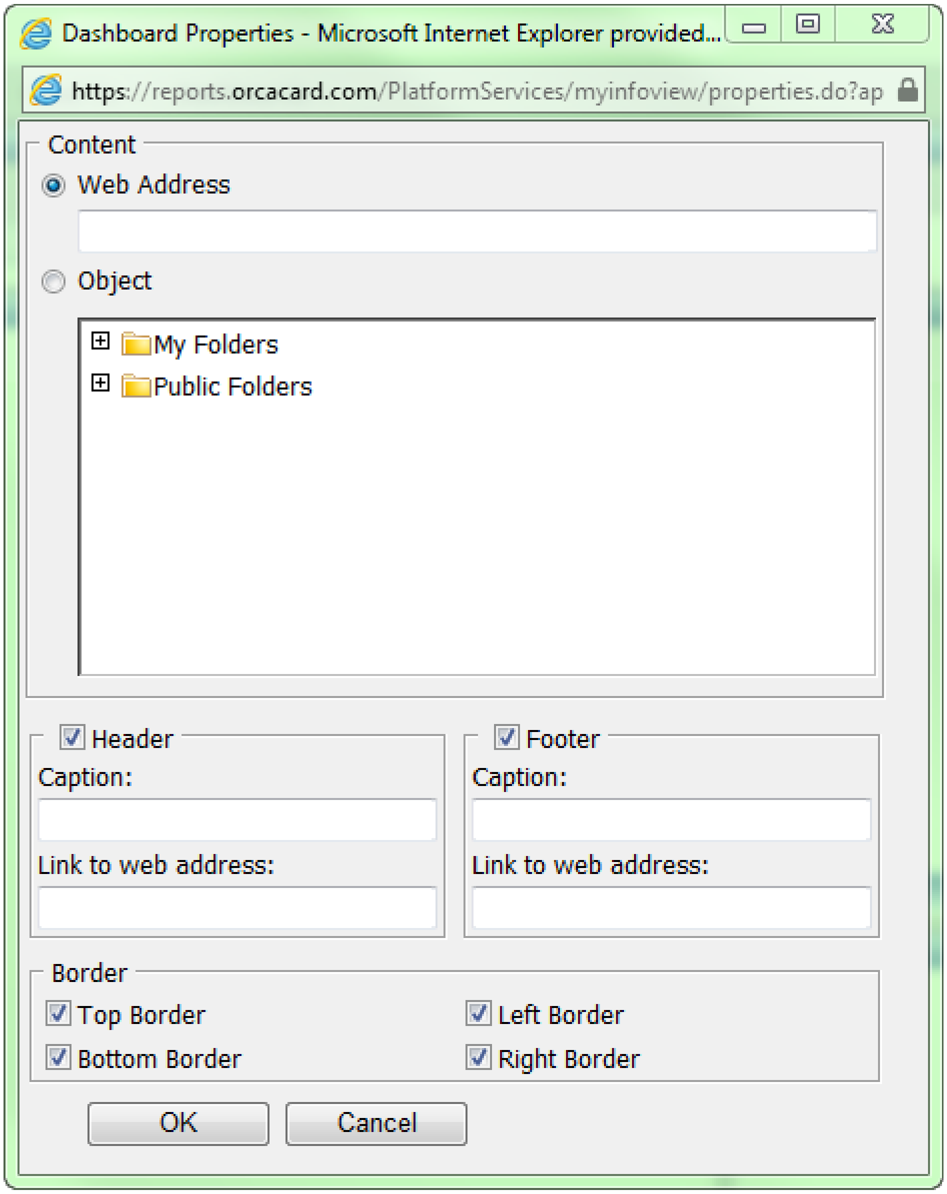


Figure 47: Dashboard Properties

Each panel can either display content from a website or it can display an object/location within ORCA Reports. By selecting Web Address and providing a valid URL, the panel can display, for example, a company website or perhaps a news/weather report. If Object is selected, the user can browse to a specific location that will display in the panel (the object list will appear – NOT the tree structure). Additionally, each panel can have a header and/or footer, and the text can be a hyperlink to a web address.

The following figure is a sample three-panel dashboard in which the first large panel on the left displays a company's website, the top-left panel is the Favorites location, and the bottom-left panel displays the objects in the Financial reports folder (Note that some of the headers are hyperlinks).

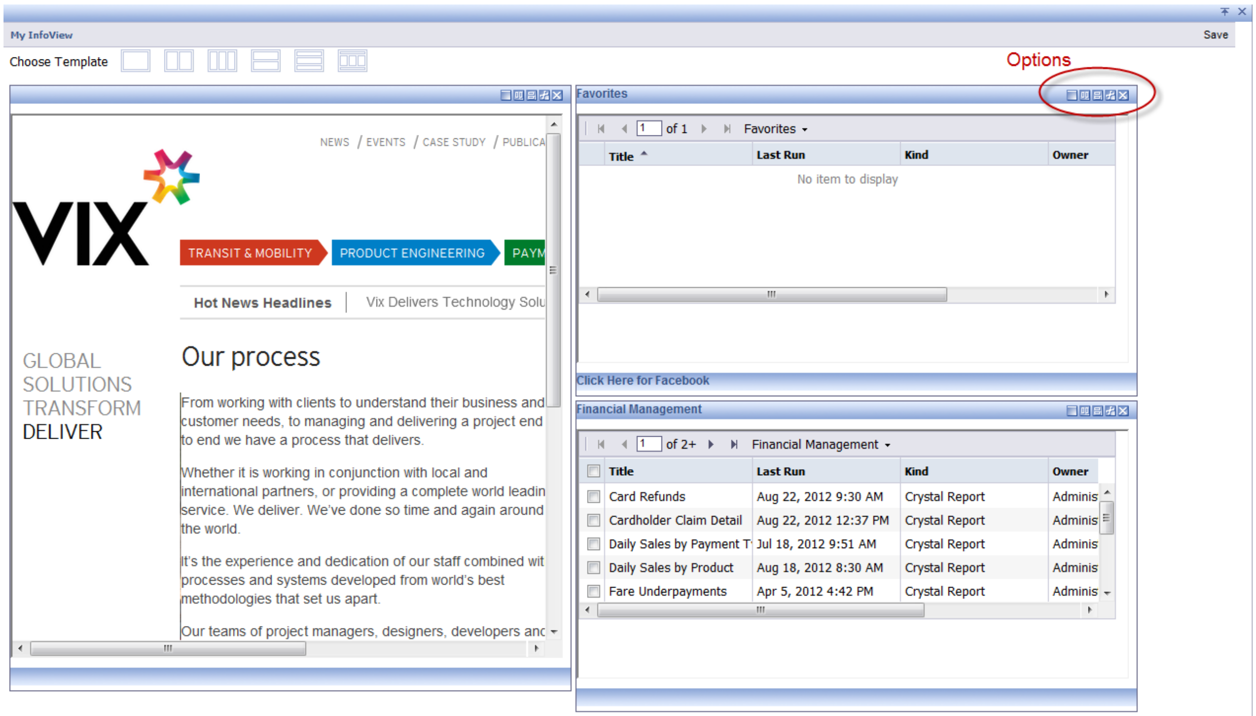


Figure 48: Dashboard Design

With each panel, there are 5 small icons in the upper right corner. These icons will:

- Reopen the panel in a new window
- Split the panel vertically
- Split the panel horizontally
- Display the panel properties (can be edited)
- Close the panel

Once the design meets your satisfaction, you can save the design/content by choosing **Save** in the upper right corner of the Workspace Panel. You can then access My InfoView by selecting **Open** from the Header Panel and choosing My InfoView. You can also set your start up location to be My InfoViewn from the Preferences panel.

When My InfoView is launched after being saved, note that the options in the upper right of each panel are different. There are now only 2 options, 1) Open in new window and 2) Maximize. Unless you choose "Edit" in the upper right of the Workspace Panel, you will not have the ability to make changes to your dashboard.